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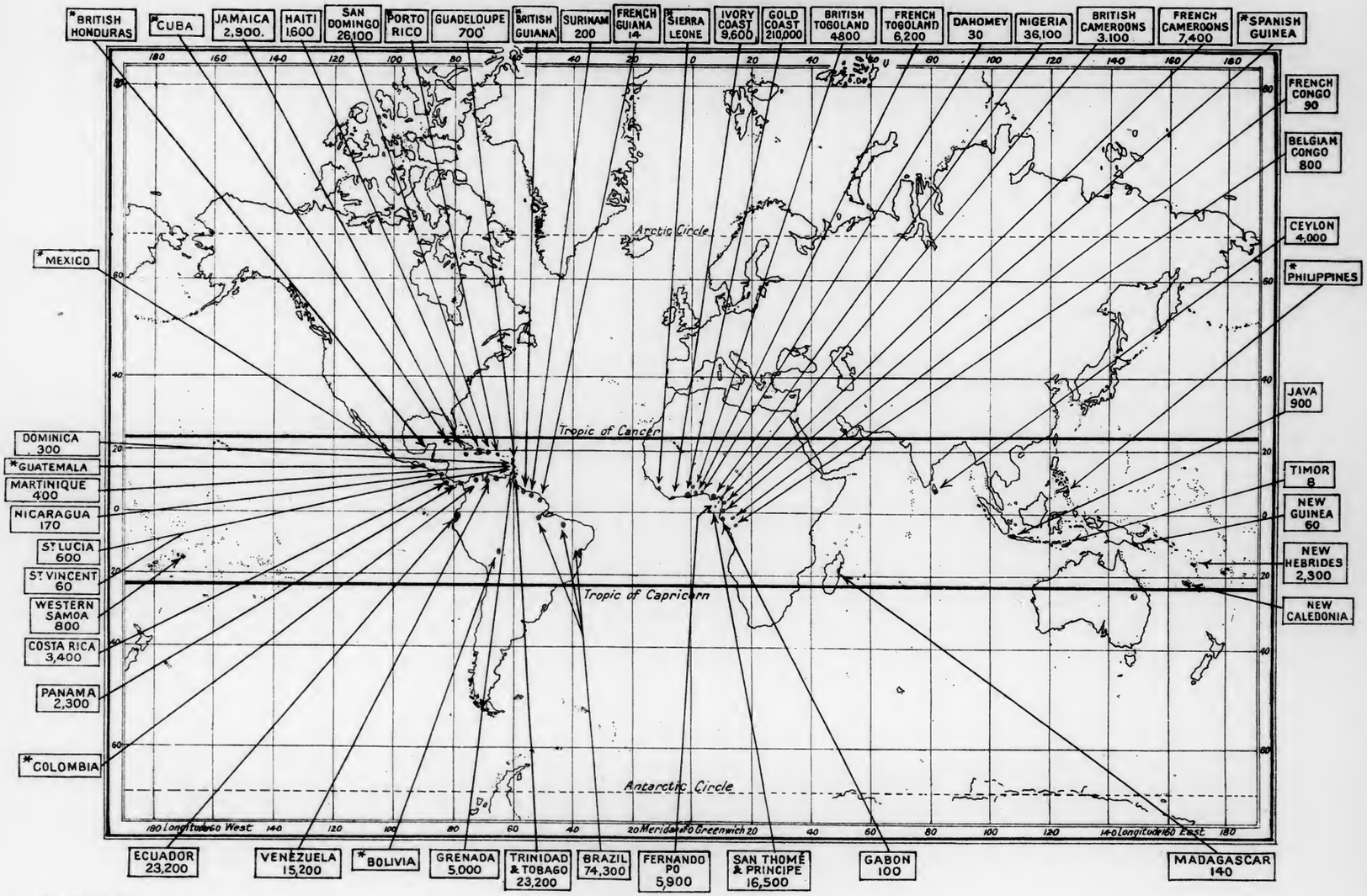
COCOA PRODUCING COUNTRIES OF THE WORLD.

(1927 EXPORTS IN TONS.)



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FOREWORD.

THE prices which cocoa producers throughout the world have received for their product have shown a marked decline during the past few years, and fears have been expressed in some quarters lest production may be developing at too rapid a pace. The problem is not new; indeed it occurs in the case of almost every product in regard to which production is expanding, and especially where the period between planting and the first financial return to the planter is to be measured in years. But cocoa is perhaps of peculiar importance owing to the abnormal rate of expansion of the industry during the past two decades, and to the overwhelming share of the British Empire in world production.

A number of British Colonies have approached the Empire Marketing Board for information and for advice as to the future of the industry and the Board's Agricultural Economics Committee accordingly suggested that the Statistics and Intelligence Branch of the Board should undertake a statistical survey of world production and consumption of cocoa, for the information of producers, and others interested in the product.

The memorandum here presented follows much the same lines as the earlier survey of this nature issued by the Board, dealing with Oranges.* It is essentially a statistical record of the trade in raw cocoa in recent years, with some indication of the general trend of consumption of cocoa preparations. No attempt has been made, except to a very limited extent, to deal with the relative price of the different qualities of raw cocoa, the costs of production, preparation and marketing, transport costs, or the general mechanism of marketing. Such questions naturally have an important bearing upon the volume of raw cocoa entering world trade, and upon prospects for the future, but they would entail a much more detailed and intensive study than could easily be included in the scope of this memorandum. Moreover, questions of marketing will come within the scope of the enquiry into the marketing of tea, coffee and cocoa which the Imperial Economic Committee is at present conducting.

Precise agreement between the different tables is not to be expected, owing to the variation in methods of classification of exports and imports. Thus the cocoa trade between two countries often shows

* Oranges: World Production and Trade (E.M.B. 15) 1s. net.

considerable discrepancies when the import returns of the one country and the export returns of the other are compared; this is a difficulty which, of course, is of constant occurrence in analysing figures of trade distribution, and it is one for which, unfortunately, there is no remedy.

Finally it should be explained that the terms "fine" and "ordinary" relate not to two kinds or qualities of cocoa, but to an infinity of qualities between the very finest product and the most inferior which enters the world market. The range within each of the two groups is very wide; the difference between cocoas on the borderline of the two groups is very narrow. The classification into "fine" and "ordinary" is intended only to give a broad indication of the relative changes in the world supply of cocoas which might perhaps be more accurately, if less concisely, termed "fine to medium or good" and "medium or good to common."

Statistics and Intelligence Branch,

Empire Marketing Board. April, 1930.

COCOA.

WORLD PRODUCTION AND TRADE.

INTRODUCTION.

1. Although there is some divergence of opinion as to the original home of the cocoa tree, it is generally believed to have originated in the region of the basins of the Orinoco and the Amazon. Cocoa appears to have been cultivated by the Indians for centuries before the discovery of America by the Old World, and it is probable that these nomads, in their wanderings, helped to spread the cocoa plant throughout tropical South America.

2. Cocoa was first discovered by Cortes in Mexico at the beginning of the 16th century, but it was not appreciated as a beverage in Europe until early in the 17th century. Owing to its costliness, the consumption of cocoa was confined to a relatively small class, and did not become popular until the latter part of last century. Among the greatest factors in popularising the consumption of cocoa were the invention in 1828 of a method of preparing cocoa powder, by C. G. van Houten, by which means a great part of the cocoa butter was removed, making a lighter and more digestible beverage; and the progressive reduction in the import duty on cocoa in this country in the first half of last century.

3. The cocoa growing countries of South and Central America, together with the West Indies, are the "old" cocoa producing countries, as cocoa is known to have been cultivated there since the 15th century. Brazil is an exception as, although cocoa grows there in a wild state, and cultivation has been carried on to a small extent in the State of Para since the middle of the 18th century, it is only within the past 50 years that cocoa has become important in the State of Bahia. The cocoa growing countries in Africa and Asia are mostly of comparatively recent development, the newest comers in the field being the British and French territories in West Africa.

4. Cocoa is entirely a tropical crop, and will not grow in the sub-tropics. It will not flourish in a climate where the temperature falls below 60°, nor generally at an altitude of more than 1,800 feet above sea level. Sufficient humidity is also of the utmost importance.

5. The area suitable for the cultivation of cocoa is consequently restricted—a great deal more so, for example, than that adapted for coffee. Fortunately, there lie within the Empire large areas of land in West Africa and elsewhere suitable for the cultivation of cocoa, and the enormous expansion in world production during the present century is largely attributable to British colonies there, which now supply the bulk of the "ordinary" cocoa consumed by the world. But it is not only in the production of "ordinary" cocoa that the Empire predominates. In the supply of high grade cocoa also, the Empire holds an important position as to both quantity and quality. The products of the West Indies, Ceylon and Western Samoa are universally recognised as standards of quality.

6. In the five years from 1923 to 1927, the British Empire supplied from 280,000 to 300,000 tons of raw cocoa annually towards the world's requirements. Some part of this quantity was shipped to other parts of the Empire, and, moreover, Empire countries import considerable quantities of cocoa from countries lying without the Empire. But taking the Empire as a unit, there was in these same years a net export varying from 200,000 to 250,000 tons annually, with an average of 228,000 tons. At a moderate estimate, the average value of the Empire's net cocoa exports may be set down as over £10,000,000 per annum.

7. In the following pages it is proposed to deal first with the various producing countries, showing the development of production and exports over a period of years, the destination of exports and the general tendency towards increase or decrease in production. In the second part figures are given for the leading importing countries. The final section gives summarised figures.

PRODUCTION AND EXPORT.

Gold Coast.

8. The first exports of cocoa from the Gold Coast were recorded in 1891 with a shipment of 80 lb. Progress has since been rapid, and now this country produces about 45 per cent. of the world's total supply, with a cocoa area estimated at about 900,000 acres, carrying some 180 million trees. The crop is grown entirely by the natives, who, under the stimulus of high prices at the end of the war, rapidly increased the cocoa acreage. The following table shows the volume of cocoa exports in certain pre-war years and annually since 1920 :—

TABLE I.—*Exports of Raw Cocoa from the Gold Coast.*

Year.	*Tons.*
1900	540
1909	20,210
1910	22,630
1911	39,730
1912	38,650
1913	50,550
1920	124,770
1921	133,190
1922	159,300
1923	197,660
1924	223,330
1925	218,150
1926	230,840
1927	209,910
1928	225,080
1929	238,490

9. Although the high prices realised by the 1920 crop encouraged production in the following years, prices fell before the new crops matured, and consequently a great deal of cocoa never reached the market from places where transport was difficult. The increased production from 1922 to 1924 is considered to have been largely due to improved transport facilities, as new roads and railways have greatly extended the area in which the production of cocoa is economically possible, and also released labour formerly needed for head transport. It is believed that when new railway lines now in course of survey are constructed considerable new areas of cocoa will be opened up.

10. Since 1924 there has been a significant check to the increase in exports. To some extent fluctuations from year to year are due to the fact that the figures relate to calendar years, whereas the main crop is harvested from October to January or later; hence a late season or (more often) the holding back of supplies by the natives or shippers for any reason, may reduce the exports in one year and magnify those of the next. The exports in 1913 and from 1924 to 1928 were as follows:—

TABLE II.—*Distribution of Exports of Raw Cocoa from the Gold Coast.*

Exported to	1913.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United Kingdom ..	26,650	39,620	53,920	46,700	48,290	51,210
Canada	—	50	840	1,550	1,200	680
Germany	15,460	41,620	44,840	51,920	44,040	54,330
France	8,440	15,280	18,650	14,950	7,290	9,090
Holland	—	66,980	36,550	38,710	38,950	43,040
U.S.A.	—	50,210	54,290	65,200	60,530	52,740
Belgium	—	890	480	480	280	1,110
Norway	—	1,100	390	1,180	970	1,040
Italy	—	1,960	2,430	4,220	1,660	4,250
French Togoland.. ..	—	4,600	4,900	4,910	4,840	5,260
Other countries	—	1,020	860	1,020	1,860	2,330
Total	50,550	223,330	218,150	230,840	209,910	225,080

11. As the Gold Coast furnishes more than one-half of the world's supply of "ordinary" cocoa, exports are naturally distributed largely among those countries which have important cocoa manufacturing trades. The United Kingdom has in the past few years taken between 20 and 25 per cent. of total exports, the United States being the leading purchaser, and Germany and the Netherlands challenging the United Kingdom for second place. The Gold Coast holds so important a place in the world's cocoa trade that it is worth while devoting some space to the possibilities of increased production or the prospect, if it exists, of a decline. The ability of the Gold Coast to increase its production of cocoa appears to depend mainly on:—

(*a*) Sufficient labour.
(*b*) An increased area for cultivation.
(*c*) Controlling disease and deforestation.
(*d*) Increasing yields and soil fertility.

12. There appears to be sufficient labour available for a substantially larger production, and no check to the increase in exports would be likely from that cause alone for many years to come. As regards the area of cocoa land, there are fairly large areas still untapped, and considerable increases in planting are possible, especially as transport facilities improve.

13. At the same time as new areas are being opened up, however, the older farms are becoming exhausted. The fertility of the soil is decreasing through constant cropping without cultivation and manuring; the control of pests is a troublesome problem owing to the difficulty of persuading the native farmer to undertake preventive measures—so much so that the Government entomologist has declared that in most areas where cocoa is now growing it is almost impossible, on account of pests, to establish new cocoa; finally, many farms have fallen out of production owing to the lack of shade and humidity on account of deforestation.

14. There is at present, however, little probability of decreased production, as new cocoa areas can still be opened up, and labour tends to migrate from the outworn farms in sufficient quantity to reinforce the local population to the point of maintaining the output. Indeed, any improvement in prices to make it worth while to harvest and export the crop would doubtless result in a further increase in exports. If problems of infestation, deforestation and soil exhaustion, all tending to operate with increasing power throughout the period of expansion of the industry, can be solved with some success within a reasonable period, it is certain that the Gold Coast can produce even larger quantities of cocoa in the future than in the past. But such increase is naturally dependent upon a remunerative market for the product being maintained.

15. In this connection the Department of Agriculture of the Gold Coast, alive to the importance of improving the rather low standard of quality of Gold Coast cocoa, has for some time past impressed upon the native producer (who is responsible for practically the whole output) the importance of complete fermentation and proper drying, and Gold Coast (and Nigerian) cocoas are now much nearer a parity with the finer sorts than they were a few years ago.

British Togoland.

16. The area under cocoa in British Togoland is increasing, and many new plantations have been established in recent years. In

Table III are shown the exports to French Togoland, whither the bulk of the consignments are sent. The figures are exclusive of any quantities sent to the Gold Coast, with which country trade is likely to expand owing to the vastly improved communications.

TABLE III.—*Exports of Raw Cocoa from British Togoland (to French Togoland).*

Year.	*Tons.*
1925	4,941
1926	4,890
1927	4,842
1928	5,255

17. The figure for 1927 would have been higher but for the fact that the 1927–28 crop was late, and hence the proportion exported before the close of the calendar year 1927 was smaller than usual. Moreover, considerable quantities of cocoa which would normally have passed into French Togoland were despatched to the Gold Coast owing to the closing of the frontier for two months on account of an outbreak of fever in the French zone.

Sierra Leone.

18. On account of climate and soil conditions the area suitable for cocoa growing in Sierra Leone is restricted to a narrow belt in the extreme south along the Liberian frontier. A good many trees have been planted in this district in recent years. The export trade is at present very small, amounting to only 84 tons in 1928, and although it is expected to develop in the near future, there seems to be little prospect of Sierra Leone taking any but a minor place in the supply of cocoa to the world.

Nigeria.

19. Nigeria is the third largest producer of cocoa in the world, only the Gold Coast and Brazil exporting larger quantities. As in the Gold Coast, the crop is practically entirely native grown, and is cultivated under very much the same conditions. That Nigerian cocoa production is so much smaller than that of the Gold Coast is to some extent due to the competition of other crops. For whereas cocoa accounts for over 80 per cent. of the Gold Coast's domestic exports, it forms only about 13 per cent. of Nigeria's exports. There is, however, a considerable degree of similarity in the development of the crop in the two countries, with an interval of some 15 years or so between them. The Gold Coast in 1901 exported 1,000 tons,

which had risen in the five years before the war to about 35,000 tons Exports from Nigeria in the five years before the war averaged about 3,500 tons; in the last few years they have averaged over 45,000 tons.

20. The quality of Nigerian cocoa is similar to that produced in the Gold Coast, and the considerable improvement which has been made recently may be largely attributed to the work of the government fermentaries. These are worked on a co-operative basis by the Department of Agriculture, and have been most valuable in demonstrating to the farmer the proper method of fermenting cocoa, and in convincing him that a better price is obtained by adequate fermenting and grading. The Government has also instituted a system of inspection of cocoa intended for export.

21. Transport difficulties have hitherto militated against a more rapid expansion of the cocoa industry, but the new programme of the Nigerian Government for road and railway construction should gradually improve the situation in this respect.

22. In Table IV below are shown exports of cocoa from Nigeria in 1900, from 1909 to 1913 and since 1920:—

TABLE IV.—*Exports of Raw Cocoa from Nigeria.*

Year.	*Exports. Tons.*
1900	202
1909	2,241
1910	2,932
1911	4,401
1912	3,390
1913	3,621
1920	17,155
1921	17,944
1922	31,256
1923	32,821
1924	37,205
1925	44,705 (*a*)
1926	39,099 (*a*)
1927	39,210 (*a*)
1928	49,164 (*a*)
1929	55,248 (*a*)

(*a*) Including exports from Cameroons, amounting to 3,639 tons in 1925, 3,104 tons in 1926, 3,121 tons in 1927, 3,573 tons in 1928 and 2,967 tons in 1929.

23. Up to 1914 the cocoa exported was divided between the United Kingdom and Germany with the rather larger proportion going to the former. During the war other countries replaced Germany, and in post-war years the United States has been taking a steadily increasing proportion of the total exports, until, in 1927, it assumed first place with over 35 per cent. of the whole quantity exported. The distribution of exports in 1913 and in the six years 1923 to 1928 is shown in Table V :—

TABLE V.—*Distribution of Exports of Raw Cocoa from Nigeria.*

Destination.	1913.	1923.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United States	—	8,680	9,480	13,310	9,340	14,090	15,180
United Kingdom ..	1,990	14,270	13,140	15,970	13,100	8,770	12,620
Germany	1,630	5,140	6,810	9,070	6,630	8,050	8,800
Netherlands	—	2,360	6,540	3,750	7,400	7,110	11,490
France	—	1,880	1,060	1,690	1,940	520	370
Italy	—	330	30	80	—	50	—
Other countries ..	—	160	140	830	690	620	700
Total	3,620	32,820	37,200	44,700	39,100	39,210	49,160

24. Exports to unspecified countries go almost entirely to the French Cameroon, with occasional small quantities to Belgium and other Continental destinations not shown above.

25. As in the case of the Gold Coast, the main cocoa crop is harvested from October onwards, and figures of exports by calendar years are not an entirely reliable guide to annual production. Actually, exports continue throughout the year, but the peak is usually reached from December to February.

26. As regards prospects of future development of the cocoa industry, it has already been pointed out that Nigeria has now arrived at the level of export volume that the Gold Coast had reached just before the war. Since that time the Gold Coast's exports have increased by over 400 per cent.; there seems to be nothing to prevent Nigeria progressing rapidly during the next 20 years, given an adequate development of transport facilities, and sufficient inducement to extend production. The cocoa area is limited climatically to a coastal

belt roughly 150 miles broad, but there is adequate land available within this region for an immense increase in the cocoa area. The population of Nigeria is eight times as large as that of the Gold Coast, and the development of the palm oil industry in the Dutch East Indies and British Malaya may have an important bearing upon the cocoa position in Nigeria, since any depression in the price of palm nuts and oil, the staple exports of Nigeria, would doubtless tend to direct labour towards cocoa cultivation and away from the collection of palm nuts and the extraction of the oil.

British Cameroons.

27. The Germans had made considerable progress in cocoa growing in the Cameroons before the war, and exports in the three years before the war averaged about 3,800 tons per annum. When the cocoa plantations in the British Cameroons were put up to auction in London a few years ago, they were very largely purchased by their former German proprietors.

28. Production in the Cameroons differs from that of the Gold Coast in that a substantial part of the cocoa is grown on large plantations, the largest being some 40,000 acres in extent. In these European plantations great care is taken in the cultivation, handling and picking of the crop. The average yield is estimated at 500 lb. of cured cocoa per acre.

29. There is a projected scheme among the European planters to market their crop co-operatively under the name of "Cameroon Cocoa" as they claim that at present their product realises little more than good Accra cocoa, in spite of the scientific care taken in drying and fermentation.

30. A movement is also reported to have been started by the European planters to purchase native cocoa, ferment it under scientific supervision and place it on the market as "native cocoa, plantation fermented."

31. In Table VI below are shown exports from the ports of Victoria and Tiko during the seven years 1923 to 1929. These indicate only approximately the development of exports from the British Cameroons; cocoa produced in that territory is not shipped solely through Victoria and Tiko nor do such shipments consist exclusively of Cameroon cocoa.

TABLE VI.—*Exports of Raw Cocoa from the Ports of Victoria and Tiko (British Cameroons).*

Year.	*Cocoa. Tons.*
1923	1,640
1924	3,170
1925	3,640
1926	3,100
1927	3,120
1928	3,570
1929	2,970

From 1925 onwards these figures have been included in exports from Nigeria (see Tables IV and V).

32. Extensive plantings have been made by natives during recent years, and German planters have manured their plantations and generally improved cultivation, which had been neglected. Hence a considerable increase in exports is to be expected within the next few years.

Trinidad and Tobago.

33. These two islands produce a superior quality of cocoa, which, owing to its fine flavour, is used very largely for blending with West African cocoa. There are three recognised types, Criollo, Forastero and Calabacillo, and owing, doubtless, to hybridization, a mixed assemblage of all grades of purity is found on almost all estates. The predominant type is Forastero, with relatively more of the hardier and poorer Calabacillo on poor lands, in drier situations, or where less care has been taken in seed selection. The crop is cultivated both in estates and by peasant proprietors, and a great deal of attention and care have been taken to preserve the reputation of the crop for its uniform good quality.

34. The recorded area under cocoa has shown a continuous decline, but there is some reason to doubt the accuracy of acreage returns, especially in earlier years. In 1928 the area had fallen to less than 190,000 acres. The oil industry has depleted certain fields owing to the clearing of cocoa lands for erecting derricks, roads, buildings, etc., while in the proximity of some of the sugar factories whole plantations of cocoa have been put under sugar. Nevertheless, production has been fairly well maintained, and the average total export for the years 1925–1929 was above that of the quinquennium preceding the war.

35. Among producers of the finer types of cocoa, Trinidad easily maintains second place, and owing to the rapid decline in production in Ecuador in recent years is now challenging that country for the leadership.

36. In the following table are shown annual exports during the pre-war quinquennium, and from 1920 to 1929. The main crop is harvested from December to May or later (with a secondary crop in September–October), and exports by calendar years are consequently not entirely satisfactory as an indication of varying production, as a late or early harvest may affect the year's figures considerably. However, there is no doubt that production in recent years has tended to decline, although a recovery seems to be now in evidence, owing to the reduction in area from the causes enumerated above, and because, at prices now ruling, there is little inducement to develop new plantations in substitution for those taken out or falling out of cultivation.

TABLE VII.—*Exports of Raw Cocoa from Trinidad.*

Year.	Trinidad Produce. Tons.	Re-exported Produce Tons.
1909	23,020	3,580
1910	25,830	3,620
1911	22,230	4,960
1912	18,580	4,720
1913	21,480	4,300
1920	28,010	—
1921	33,590	3,710
1922	22,610	2,740
1923	30,220	2,860
1924	25,180	1,770
1925	22,090	3,250
1926	22,350	3,030
1927	23,190	2,900
1928	25,900	4,130
1929	27,540	4,730

37. There is a considerable import trade in raw cocoa into Trinidad, mainly from Venezuela, with smaller quantities from other British West Indian Islands. Almost the whole of the imported cocoa is re-exported.

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38. The United States is by far the most important purchaser of Trinidad cocoa, taking between 40 and 60 per cent. of all exports. Distribution of Trinidad's domestic exports in 1913 and in recent years is given below :—

TABLE VIII.—*Distribution of Exports of Trinidad Cocoa.*

Destination.	1913.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United States	10,570	13,170	11,500	14,010	9,480	12,000
France	6,980	3,440	3,190	2,480	4,620	3,910
Netherlands	830	1,960	930	1,770	2,630	1,830
United Kingdom ..	1,750	2,130	2,720	1,530	1,900	1,360
Germany	470	2,220	1,390	800	1,390	2,210
Canada	310	690	560	450	1,020	1,980
Australia	(*a*)	900	860	610	880	1,030
Italy	330	100	220	150	430	430
Belgium	(*a*)	190	230	210	230	390
Spain	30	20	100	70	210	200
Argentina	(*a*)	(*a*)	190	170	190	180
Other countries	210	360	200	100	210	380
Total	21,480	25,180	22,090	22,350	23,190	25,900

(*a*) Included in other countries.

39. Venezuelan and other cocoa imported is also shipped mainly to the United States, which takes nearly 70 per cent. of the re-exports of cocoa, with the United Kingdom, Canada and France, the leading other purchasers.

40. The downward tendency in cocoa production in Trinidad is serious, especially taken in conjunction with the even more pronounced decline in Ecuador and Venezuela. Costs of production are high in comparison with those in West Africa and other countries producing " ordinary " cocoa. By reason of its quality, Trinidad cocoa has always enjoyed a substantial premium over the common types of cocoa, and it is only by virtue of this premium that it is able to compete in the world's markets. The fall in the price of cocoa during the past year or two has accentuated the difficulties of the producers, and the improving quality of West African cocoa is enabling manufacturers to dispense with the finer flavouring cocoas to an increasing extent. Hence, in spite of the decrease in production, the premium

paid for fine cocoas tends to narrow, and it seems likely that production in Trinidad will continue to decline, unless and until the consuming public shows a much more marked preference for the "finer" cocoas—a contingency which appears to be somewhat remote in view of the improvement in quality of the ordinary cocoas and the manufacturers' success in dealing with them.

41. Some reference should be made to the Cocoa Planters' Association of Trinidad, which is a co-operative society of planters for marketing their produce. The association was formed by twenty-six planters in 1905 with the idea of securing a better premium for their superior grade of cocoa, as it was realised that manufacturers will not pay the premium merited by a better grade of product unless they can be assured of continuity of supply. This association now markets about one-seventh of the colony's total output.

Grenada.

42. This island produces a fine grade of plantation cocoa which, as in the case of Trinidad, is used widely in blending with West African and Brazilian cocoas. It takes first place as regards volume of production of fine cocoa among the minor producing countries, being exceeded only by the three major producers, Trinidad, Ecuador and Venezuela.

43. Up to about 1920 there was a gradual increase in production, the average output rising from about 4,400 tons per annum in the six years 1897–1902 to 5,600 tons annually in the years 1915–20. During the earlier part of this period the increase was no doubt due to extension of cultivation and increase in the yield of young trees as they came into full bearing. There has been little or no extension in cocoa cultivation for many years, and the maximum crops of the island were reached during the period 1915–20. Following that period there was a fall in production, and the average output from 1921–26 was under 4,000 tons per annum, or less than 24 years earlier. The main cause of the decline after 1920 was a severe hurricane which struck the island in 1921, causing much damage. There was subsequently a slow improvement as the plantations recovered from the effects of the hurricane, but the interplanting of nutmeg-trees with the cocoa and the cutting out of unprofitable plantations, have militated against a rapid recovery in production. The cocoa trees had barely recovered from the effects of the hurricane when a rather severe drought was experienced at the beginning of 1927, resulting in certain areas receiving a further set-back and generally retarding

the crop, so that exports which had increased from 3,600 tons in 1922 to over 5,000 tons in 1927, again declined in 1928 to 4,600 tons. Exports of cocoa in pre-war and post-war years are shown below :—

TABLE IX.—*Exports of Raw Cocoa from Grenada.*

Year.	*Exports. Tons.*
1909	5,410
1910	5,930
1911	5,020
1912	5,050
1913	5,260
1918	6,780
1919	4,970
1920	4,090
1921	4,370
1922	3,640
1923	3,890
1924	4,270
1925	3,660
1926	4,170
1927	5,020
1928	4,570
1929	4,550

44. The United Kingdom and the United States together take the greater part of Grenada's cocoa exports, and Canada is the only other important purchaser. Distribution of exports in 1913 and from 1924 to 1928 is shown below :—

TABLE X.—*Distribution of Exports of Raw Cocoa from Grenada.*

Destination.	1913.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United Kingdom	2,980	2,390	1,550	1,720	1,940	2,100
United States	1,490	1,420	1,850	2,130	2,430	1,800
Canada	—	170	110	100	500	620
France	790	150	120	170	130	40
Other countries	—	140	30	50	20	10
Total	5,260	4,270	3,660	4,170	5,020	4,570

45. Cocoa production in Grenada is intensive on the whole, although the peasant owner is an important element, and in spite of the reduction in the area under the crop, the output is not likely to decline seriously. On the other hand, there is little prospect of any increase in the cocoa area. Cocoa accounts for about three-fifths of the value of exports annually, and the recent reduction in cocoa prices is a serious blow to the producers, but in view of the concentration of production in the most suitable plantations, the volume of production should be maintained at about its present level, unless climatic causes again intervene to reduce the crop, or a further fall in prices leads to a further reduction in area.

Jamaica.

46. Jamaica produces cocoa similar to that of Trinidad, although slightly inferior in quality, but the cultivation of this crop has been somewhat neglected owing to the increased attention given to bananas and sugar. The cocoa area, which in pre-war years amounted to 11,700 acres, had fallen by 1924 to 9,000 acres, and by 1928 to 4,700 acres.

47. Exports in recent years have fallen far below the heavy figures for 1922, and the average for the five years ended 1929 was only slightly above the pre-war level. Exports of cocoa in pre-war and post-war years are shown below :—

TABLE XI.—*Exports of Raw Cocoa from Jamaica.*

Year.	*Tons.*
1909	2,974
1910	1,750
1911	2,681
1912	3,284
1913	2,318
1920	2,522
1921	3,248
1922	3,842
1923	2,156
1924	2,960
1925	2,617
1926	3,008
1927	2,863
1928	2,252
1929	3,032

48. The United Kingdom and the United States are the largest consumers of Jamaican cocoa, Canada and France being the only other important purchasers. The distribution of exports pre-war and in recent years is shown in the following table :—

TABLE XII.—*Distribution of Exports of Raw Cocoa from Jamaica.*

Destination.	Average 1910–14.	1923.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United Kingdom ..	1,220	1,492	799	1,813	102	678	201
British Empire ..	156	264	242	48	320	560	450
U.S.A.	497	220	966	243	1,886	1,135	1,114
Other countries ..	857	180	953	513	700	490	487
Total	2,730	2,156	2,960	2,617	3,008	2,863	2,252

St. Lucia.

49. Cocoa has been successfully cultivated in St. Lucia for fifty years. Most of the plantations are situated in the moist and cooler areas of the island, mainly at the heads of sugar growing valleys and lining the minor valleys throughout the island. The present area under cocoa is estimated at 6,000 acres. There is a considerable area now under native forest suitable for cocoa cultivation.

50. During the years 1927 and 1928 growers gave increased attention to their estates owing to the more favourable prices ruling, and the quality of the beans has shown a marked improvement. There has been a marked falling off of the quantity consigned overseas in 1928 and 1929 in comparison with the recovery of the previous year.

51. In the following table are shown the exports from St. Lucia from 1911 to 1913 in comparison with post-war years ; it will be noted that there has been a substantial fall in the quantity exported :—

TABLE XIII.—*Exports of Raw Cocoa from St. Lucia.*

Year.	*Tons.*
1911	926
1912	855
1913	729
1922	729
1923	641
1924	608
1925	522
1926	502
1927	609
1928	550
1929	445

52. Shipments are mainly to the United Kingdom, Trinidad and the United States. The quantity sent to the Netherlands has fallen off in the past two years. In the following table are shown the quantities exported to the main countries of consignment in 1913 and in recent years :—

TABLE XIV.—*Distribution of Exports of Raw Cocoa from St. Lucia.*

Consigned to.	1913.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United Kingdom	300	294	292	201	264	292
Trinidad	—	33	72	126	230	161
U.S.A.	46	230	64	49	113	71
Netherlands	37	14	73	118	—	8
Other countries	346	37	21	8	2	18
Total	729	608	522	502	609	550

St. Vincent.

53. The cultivation of cocoa is not of great importance in this island, as conditions are not considered to be very favourable to its cultivation. The quantity exported is now much less than in pre-war days, as is shown by the following table of the total exports in the years 1911 to 1913 and 1922 to 1929 :—

TABLE XV.—*Exports of Raw Cocoa from St. Vincent.*

Year.	*Tons.*
1911	128
1912	100
1913	95
1922	62
1923	54
1924	58
1925	69
1926	78
1927	61
1928	80
1929	70

54. The principal countries of destination of St. Vincent exports of cocoa are the United Kingdom, Barbados and the United States. Below are given the quantities consigned to various destinations in a series of recent years as compared with 1913 :—

TABLE XVI.—*Distribution of Exports of Raw Cocoa from St. Vincent.*

Consigned to.	1913.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United Kingdom	40	12	38	28	18	36
Barbados	(a)	31	17	29	23	30
U.S.A.	17	—	5	20	13	10
Other countries	38	15	9	1	7	4
Total	95	58	69	78	61	80

(*a*) Included in other countries.

Ceylon.

55. Cocoa cultivation received its first impulse on this island between 1870 and 1880 when a leaf disease was destroying the coffee plantations. The "Forastero" plant, which is hardy and highly yielding, is gradually replacing the less prolific Venezuela " Criollo," generally known as the " Old Ceylon Red," the original cocoa plant of the island. The change is due to the greater resistance to disease of the Forastero plant and to the long periods of drought which occur in the cocoa growing districts. Nevertheless, diseases are still rife and seriously curtail output. While the Criollo produces a finer grade of cocoa

which commands a higher price, the heavier yields from the Forastero compensate for the lower market value of the product.

56. The amount of land suitable for cocoa cultivation in Ceylon is limited, as the plant cannot be cultivated below 500 feet or above 2,000 feet elevation. It is estimated that there are at present about 35,000 acres under cocoa.

57. There have been considerable yearly fluctuations in exports owing chiefly to the main harvest lasting into January, with the result that an early or late harvest may considerably alter the yearly figures. The main or autumn crop is gathered in November, December and January, and the small spring crop in May, June and July. Averaged over quinquennial periods, which eliminate to a considerable extent the fluctuations caused by early or late seasons, there has been relatively little variation in exports, although post-war years showed a slight falling off. Average exports in the five years from 1909 to 1913 amounted to 3,537 tons ; in the following quinquennium they rose to 3,576 tons. From 1919 to 1923 the average was only 3,216 tons, but there was a recovery in the years 1924 to 1928 to an average of 3,573 tons.

58. Annual exports during the five years from 1909 to 1913 and from 1919 onwards are shown below :—

TABLE XVII.—*Exports of Raw Cocoa from Ceylon.*

Year.	*Exports. Tons.*
1909	4,036
1910	3,564
1911	3,071
1912	3,588
1913	3,426
1919	2,944
1920	2,820
1921	3,112
1922	4,161
1923	3,045
1924	3,468
1925	3,439
1926	3,238
1927	4,040
1928	3,681
1929	4,134

59. The Philippine Islands, the United Kingdom and the United States are the leading markets for Ceylon cocoa, but a number of other countries take considerable quantities. The quantity of cocoa purchased by the United Kingdom from Ceylon has declined from 2,200 tons in 1913 to 550 tons in 1928, but the deficiency has been more than counter-balanced by the increased buyings by other countries, more especially the Philippine Islands.

60. The details of the countries to which Ceylon cocoa was consigned in the years 1913 and from 1925 to 1928 are given below :—

TABLE XVIII.—*Exports of Raw Cocoa from Ceylon.*

Exported to	1913.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.
United Kingdom	2,196	1,180	590	823	546
Belgium	20	45	50	69	28
Germany	212	44	90	237	92
Holland	42	20	14	134	13
Australia	13	150	330	244	120
Hong Kong	—	5	—	54	18
New Zealand	71	1	21	27	18
Straits Settlements	66	—	20	32	27
U.S.A.	182	357	383	566	432
South Africa	5	3	8	17	18
Canada and Newfoundland ..	57	202	184	279	333
Philippine Is.	407	1,264	1,306	1,258	1,514
Argentina	(*a*)	—	24	42	38
Denmark	(*a*)	5	13	24	11
Italy	(*a*)	—	14	91	32
Mexico	(*a*)	156	12	33	413
Sweden	(*a*)	7	7	18	14
Other countries	155	—	172	92	14
Total	3,426	3,439	3,238	4,040	3,681

(*a*) Included in " Other countries."

Western Samoa.

61. A very choice variety of cocoa is cultivated in Western Samoa. About 4,000 acres are entirely devoted to cocoa, and a further 500 acres of rubber are interplanted with cocoa trees. Production is

increasing, although shortage of labour seriously handicaps the industry, and the yield has grown from 678 tons in 1925 to 757 tons in 1927.

62. There is very little native production, but efforts are being made to encourage native plantation, and education in cocoa cultivation is being given by inspectors.

63. The increase in production is reflected in the expansion of exports, which in recent years have been as follows :—

TABLE XIX.—*Exports of Raw Cocoa from Western Samoa.*

Years.	*Tons.*
1925	664
1926	356
1927	792
1928	959

The decrease in exports in 1926 was due to unfavourable weather conditions early in the year.

Ecuador.

64. Prior to 1910 Ecuador ranked first among cocoa growing countries, but has since been surpassed by the Gold Coast, Nigeria, Brazil and the Dominican Republic. Yet, although Ecuador has had to cede place as regards quantity, its cocoa still ranks very high as regards quality.

65. Cocoa is grown in five provinces in Ecuador, each one producing a distinctive quality. Los Rios produces the product known commercially as "Arriba", and the other provinces cocoas which are much less well known than "Arriba", which is the finest in quality. It is produced all through the year, but the main crop is from March to June ; it is then at its best, and the cocoa is known as " Summer Arriba."

66. The cocoa is cultivated mostly on estates situated along the river banks near the littoral ; the estates are in general very large, and are said to be mostly owned by foreign capital, chiefly British and German.

67. The industry made great progress from 1890 onwards owing to the introduction of Forastero trees from Trinidad, but, unfortunately, the introduction of these trees affected the quality of the

product. Exports from 1919 onwards are shown in Table XX, in comparison with the averages for 1909–13 and 1914–18 :—

TABLE XX.—*Exports of Raw Cocoa from Ecuador.*

Year.	*Exports. Tons.*
1909–13 (average)	36,760
1914–18 (average)	41,420
1919	43,960
1920	46,030
1921	42,170
1922	43,550
1923	30,390
1924	32,720
1925	32,380
1926	21,430
1927	23,200
1928	22,600

68. During the twelve years from 1911 to 1922 exports were remarkably uniform, varying only from a minimum of 36,400 tons in 1915 to a maximum of 46,000 tons in 1920. However, a fungus disease (" Monilia ") made its appearance in 1917 and soon spread rapidly, while in 1927 the dread " witch-broom " was noted, and has since caused immense havoc on the plantations. The methods of cultivation used have facilitated the spread, and have rendered difficult the control, of fungoid diseases.

69. The effect is apparent from the above figures, annual exports from 1926 to 1928 being about half the average from 1914 to 1922. The Department of Agriculture of Ecuador has even stated, in a bulletin published in November, 1926, that the diseases have become so widespread that cocoa production in the country may have to cease. Many plantations have already been abandoned, and others have been planted with bananas, coffee and other crops. The climate and situation of Ecuador appear to favour the spread of fungus disease, and control methods have so far proved prohibitively expensive. In one group of plantations in the Balao district production, which averaged about 3,300 tons per annum from 1918 to 1922, fell to 1,700 tons in 1923, to 800 tons in 1924, and to only 90 tons in 1925.

70. As in the case of most South American producing countries, the bulk of the crop is shipped to the United States, with France, Germany and Holland the principal other purchasers. Distribution of exports in recent years is shown below :—

TABLE XXI.—*Distribution of Exports of Cocoa from Ecuador.*

Destination.	1924. Tons.	1925. Tons.	1926. Tons.	1927. Tons.	1928. Tons.
United States	13,060	15,200	10,410	8,400	8,820
Germany	6,840	5,100	2,340	3,960	4,370
France	1,840	2,810	2,810	3,940	2,790
Netherlands	5,810	3,650	2,250	3,160	2,290
Spain	920	1,250	990	1,390	1,240
United Kingdom	1,480	1,510	930	380	520
Italy	740	690	650	570	550
Sweden	550	580	280	290	410
Belgium	400	550	230	290	470
Denmark	430	480	160	280	250
Argentina	10	130	130	200	150
Australia	190	210	110	160	130
Other countries	450	220	140	180	610
Total	32,720	32,380	21,430	23,200	22,600

71. Ecuador cocoa, owing to its quality, has in the past enjoyed a very wide distribution for flavouring purposes, but as in the case of the other fine cocoas, demand purely for flavouring is now rather less keen than formerly. As indicated above, exports have declined with striking rapidity, and although even so late as 1927 the country was still the largest exporter in the world of fine cocoa, there seems to be considerable prospect of production continuing to decline, and of demand being eventually compelled to turn to other sources for supplies of the finest types of cocoa.

Brazil.

72. Brazil takes second place to the Gold Coast in volume of production of cocoa. In 1926 the total number of cocoa trees in Brazil was estimated at about 130 million (compared with 180 million in the Gold Coast), of which 110 million were in the state of Bahia.

73. Cocoa is grown in the States of Para, Maranhao, and Bahia, but the last named supplies over 90 per cent. of the total cocoa exports of the country, and the product is commercially known as " Bahia." The best quality is usually regarded as slightly superior to Gold Coast cocoa, and its price is usually a shade higher. Cocoa has been cultivated for a considerable time in the state of Para, and the product is superior to that of Bahia, but the output is relatively small.

74. Brazil has to import every year about 50 per cent. of her home requirements from Venezuela, as her own product does not find much favour unless blended with a superior quality of cocoa.

75. The State Department of Agriculture and the Cocoa Growers' Association are making strenuous efforts to encourage the cultivation of Venezuelan Criollo in the state of Bahia on account of the higher price realised for this product. It is said that some 20,000 trees of this variety already exist in the State, but planters are not enthusiastic over it owing to the lighter yield.

76. Table XXII below shows exports in 1880, and in certain pre-war and post-war years. Development has been fairly continuous since 1910, and in 1927 exports reached their maximum with a total of over 74,000 tons, or more than double the quantity exported from any other country except the Gold Coast.

TABLE XXII.—*Exports of Raw Cocoa from Brazil.*

Year.	Tons.	Year.	Tons.
1880	1,510	1922	44,560
1910	28,670	1923	64,300
1911	34,430	1924	67,780
1912	30,010	1925	63,510
1913	29,280	1926	62,310
1914	40,120	1927	74,350
1920	53,540	1928	71,230
1921	42,200		

77. The great expansion in cocoa production from 1890 onwards is said to be due to bands of nomadic workers resulting from the emancipation of the slaves of the sugar plantations of the north. Living in huts under most primitive conditions, they clear the forest and plant

cocoa. Planters with capital frequently obtain established plantations by buying up a number of connecting holdings from these nomads, who then move on to fresh fields and repeat the process.

78. The United States has for long been the principal purchaser of Brazilian cocoa, but in 1913 took only about one-third of total exports, while the United Kingdom took over one-quarter of the exports in that year. The United Kingdom's purchases have, however, declined to small proportions, and in recent years the United States has taken from 50 to 60 per cent. annually of total exports, while Germany, Holland, France and other continental countries take the greater part of the remainder.

79. Table XXIII shows the distribution of Brazil's cocoa exports in 1913, and from 1922 to 1926.

TABLE XXIII.—*Distribution of Exports of Cocoa from Brazil.*

Exported to	1913.	1922.	1923.	1924.	1925.	1926.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Germany	3,620	8,310	5,850	12,450	6,540	5,680
Argentina	1,000	2,400	2,940	2,720	2,780	2,560
Belgium	50	1,660	2,320	1,890	1,130	880
Colombia	—	—	—	—	530	1,030
Denmark	210	880	850	920	970	960
U.S.A.	9,890	18,310	38,740	33,030	32,580	39,780
France	4,710	5,120	4,840	6,570	5,850	3,000
United Kingdom ..	7,830	970	390	600	1,340	750
Holland	950	4,020	4,210	5,230	6,160	3,760
Italy	140	200	830	1,760	2,380	1,710
Norway	10	870	660	290	470	340
Sweden	—	1,420	2,070	1,920	2,080	1,070
Uruguay	80	330	420	130	310	240
Other countries	790	70	180	270	390	550
Total	29,280	44,560	64,300	67,780	63,510	62,310

80. There seems no reason to suppose that cocoa production in Brazil, which has made so marked an advance in the past fifteen years, will not continue to increase. The industry labours under a number of handicaps, such as high export and municipal taxes, heavy transport charges, and the scarcity and costliness of labour. As the

permanent workers on the plantations are not sufficient to harvest the crop, planters have to rely on casual labour at harvest time. These labourers have to be paid in cash, which is generally secured in the form of an advance against contracts to deliver cocoa. This naturally tends to depress the price the grower receives for his product.

81. There has been considerable agitation among the planters for some sort of Government protection against fluctuations in prices, such as already exists in the coffee trade. But it is generally recognised that the obstacles in the way of such a scheme are insurmountable, among these being the fact that cocoa cannot be stored for any length of time in a hot, damp climate. Moreover, of course, Brazil does not occupy the same position among the world's cocoa growing countries as among coffee producing countries.

82. It is claimed that Brazil is ideally situated for the production of cocoa, and land recently opened up is said to be better suited for cocoa cultivation than any to be found in Bahia. In spite, therefore, of the adverse factors militating against the development of the industry, it seems likely that production will continue to increase.

Venezuela.

83. Venezuela is one of the group of countries producing choice cocoa, and as regards quality its product holds first place on the market. Two varieties of cocoa are cultivated in Venezuela—"Criollo" and "Trinitario." The Venezuelan "Criollo" variety, which is cultivated in the centre and west of the country, was at one time classed as an ideal cocoa, as it was said to contain all the elements necessary for perfect cocoa, but the importance of preserving the purity of the strain was not sufficiently realised, and cross fertilisation with "Trinitario" has produced a number of varieties all more or less inferior to the original "Criollo."* "Trinitario" is cultivated mostly in the east of the country.

84. It is estimated that there are about 148,000 acres under cocoa, and that there is still a fairly large area available for development. However, production has fallen off considerably in recent years, and there does not appear to be any immediate prospect of a recovery, owing to shortage of labour, lack of capital and the competing interest of coffee planting. Annual exports of cocoa are shown in Table XXIV.

* Pitter "Las Plantas Usuales de Venezuela."

TABLE XXIV.—*Exports of Raw Cocoa from Venezuela.*

Year.	*Exports. Tons.*
1909–13 (average)	15,800
1920	17,310
1921	21,340
1922	20,560
1923	22,070
1924	17,050
1925	22,580
1926	14,810
1927	15,160

85. Exports reached their maximum in the quinquennium beginning 1921, during which shipments fell below 20,000 tons in only one year. In 1926 and 1927 exports were below the average of the five years before the war. The United States is now the chief purchaser, although before the war more than one-half the exports went to France, and that country is still a fairly close second, and has recently been increasing her share. Table XXV shows the distribution of exports in 1913, and from 1924 to 1927.

TABLE XXV.—*Distribution of Exports of Cocoa from Venezuela.*

Country.	1912–13. Tons.	1924. Tons.	1925. Tons.	1926. Tons.	1927. Tons.
United States	1,990	6,320	8,890	5,670	5,690
France	8,100	4,070	3,020	3,850	4,030
Germany	610	1,710	1,840	520	1,260
Spain	1,600	1,030	1,090	1,020	1,350
Holland	90	1,210	1,240	570	870
United Kingdom	60	500	700	560	760
Trinidad	1,980	1,060	980	870	200
Belgium	10	290	390	140	210
Italy	60	190	140	170	140
Other countries	70	670	4,290	1,440	650
Total	14,570	17,050	22,580	14,810	15,160

86. Considerable quantities of cocoa are exported to Trinidad from Venezuela, but the bulk of this cocoa is subsequently re-exported to the United States, United Kingdom, Canada, France and elsewhere.

Costa Rica.

87. The development of cocoa production in Costa Rica has been very rapid since pre-war days. In the quinquennium ending 1913, exports averaged only 284 tons, while by 1922 shipments had increased to over 2,000 tons; four years later they had grown to over 5,200 tons, and in 1928, when there was a record crop, to 5,700 tons.

88. The rapid expansion of cocoa cultivation in recent years is mainly in the province of Limon, where land thrown out of banana cultivation owing to the ravages of Panama disease is now devoted to cocoa. Further increase in the production in this area is to be expected. There was a rapid extension in the cocoa area between 1919 and 1922, and the extension is reflected in the increase in exports during the past few years.

89. Exports of cocoa during pre-war years and from 1922 onwards are shown below :—

TABLE XXVI.—*Exports of Raw Cocoa from Costa Rica.*

Year.	*Exports. Tons.*
1909–13 (average)	280
1922	2,060
1923	4,190
1924	3,620
1925	4,080
1926	5,230
1927	3,370
1928	5,680

90. The United States is the chief purchaser of the Costa Rica product, as is shown in the following table of the exports giving details of countries for the years 1913 and 1924 to 1927.

TABLE XXVII.—*Distribution of Exports of Cocoa from Costa Rica.*

Exported to	1913. Tons.	1924. Tons.	1925. Tons.	1926. Tons.	1927. Tons.	1928. Tons.
U.S.A.	40	990	910	1,900	1,110	—
Colombia	(*a*)	930	870	1,330	750	—
Panama	(*a*)	240	490	1,110	640	—
Germany	(*a*)	180	290	80	270	—
Chile	(*a*)	130	140	130	240	—
United Kingdom	240	20	90	60	80	—
San Salvador	(*a*)	110	80	110	80	—
Peru	(*a*)	140	340	250	80	—
France	(*a*)	740	680	210	80	—
Guatemala	(*a*)	70	100	40	30	—
Other countries	100	70	90	10	10	—
Total	380	3,620	4,080	5,230	3,370	5,680

(*a*) Included in " Other countries."

91. The area suitable for cocoa growing on the Atlantic side is estimated at about 370,000 acres, or about five times the present area under cocoa. Cultivation would also be possible on the Pacific side if irrigation were provided. A very high grade of cocoa is produced.

Haiti.

92. Except for a small plantation at Bayeux where about 15 acres are cultivated, the whole of the cocoa produced in Haiti grows wild. It is picked by the natives when the price is sufficiently attractive for it to assume a greater interest than work in the coffee plantations or upon other crops, and exports are consequently very variable, depending almost entirely upon the market price. In any case the output is comparatively small, and shows little signs of increase.

93. Owing to lack of care in fermenting, the quality is inferior to the product from other West Indian Islands. The bulk of the crop is absorbed by the United States, but Germany has in recent years increased its purchases, and from 85 per cent. of total exports in 1923 the share of the United States had declined to about 71 per cent. in 1928. However, of the small exports of 1,340 tons in 1929, the United States again took over 80 per cent. (1,090 tons), while Germany and France took 140 and 110 tons respectively.

94. Exports of cocoa for the fiscal years ending 30th September showing quantities and countries of destination are given below :—

TABLE XXVIII.—*Distribution of Exports of Cocoa from Haiti.*

Exported to	1923.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United States of America	1,700	1,060	1,080	1,110	690	1,660
France	260	540	320	810	600	310
Germany	10	—	110	220	250	360
Other countries	20	20	—	20	60	20
Total	1,990	1,620	1,510	2,160	1,600	2,350

Panama.

95. While a high grade of cocoa is produced in parts of Panama, in certain areas in Darien it grows wild. Exports have very considerably expanded since before the war. The annual average for the five years 1909 to 1913 was only 29 tons, whereas in both of the years 1926 and 1927 the quantity exported was over 2,000 tons, and in 1928 over 3,000 tons, the details being given in Table XXIX below. The bulk is consigned to the United States :—

TABLE XXIX.—*Exports of Raw Cocoa from Panama.*

Year.	*Tons.*
1909–13 (average)	29
1925	2,000
1926	2,490
1927	2,290
1928	3,090

Dominican Republic.

96. This country produces an "ordinary" cocoa of the kind known commercially as San Domingo. The crop comes in through the whole year, but the main crop is picked from March to June, with a second crop picked from October to December. Plantings in recent years have been on a small scale only.

97. Exports have shown an increasing tendency since the year 1922, and although in comparison with the larger producers of common cocoa, the Dominican Republic is not of great importance, the

country ranks fourth, on 1927 figures, among all exporting countries, having superseded Ecuador in that year, although an appreciable falling off occurred in the following year. Exports in pre-war and post-war years are shown below :—

TABLE XXX.—*Exports of Raw Cocoa from Dominican Republic.*

Year.	*Exports. Tons.*
1911	19,510
1912	20,500
1913	19,160
1921	26,150
1922	18,690
1923	19,520
1924	22,780
1925	23,110
1926	19,770
1927	26,090
1928	19,000
1929	21,150

98. Almost the whole of the Dominican cocoa crop is taken by the United States, and other countries are represented by very small quantities. The details for 1923 to 1928 are given in the following table :—

TABLE XXXI.—*Distribution of Cocoa Exports from the Dominican Republic.*

Destination.	1923.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
U.S.A.	19,320	22,290	22,220	19,400	25,600	18,460
France	60	110	260	20	60	50
Germany	110	170	210	—	30	—
Netherlands	—	90	300	140	90	140
Mexico	—	—	20	110	250	280
Other countries	30	120	100	100	60	70
Total	19,520	22,780	23,110	19,770	26,090	19,000

San Thomé and Principe.

99. These Islands produce a medium type of "ordinary" cocoa, which usually ranks somewhat above that of Bahia as to quality. A great deal of care is taken in cultivation and the preparation of the beans for market. The exports for the years 1925 to 1927 are compared with the averages of those of earlier periods in Table XXXII below:—

TABLE XXXII.—*Exports of Raw Cocoa from San Thomé and Principe.*

Period.	*Exports. Tons.*
1895–99 (average)	9,250
1900–04 (average)	17,920
1905–09 (average)	26,430
1910–13 (average)	34,080
1920–24 (average)	19,370
1925	20,530
1926	12,270
1927	16,500

100. Cocoa has been cultivated since 1828 and reached its peak of production shortly before the war, at which time the islands were the second largest exporters of cocoa in the world, taking second place only to Ecuador. Since the pre-war period exports have shown a steady decrease, largely due to the ravages of "thrips" and to deforestation. Strong measures have been taken to combat "thrips," but there is no present indication of any recovery in cocoa production. As in British West Africa the main crop ripens in October and November, with a secondary crop in March and April.

101. The whole of the crop is exported to Lisbon, whence the greater part is re-exported to other markets. As will be seen from Table XXXIII below, showing re-exports of San Thomé cocoa from Portugal in 1923, 1924 and 1927 (figures for intervening years are not available), Germany and Holland are the most important buyers of the produce of San Thomé, with other Continental countries, especially France and Italy, also of appreciable importance:—

TABLE XXXIII.—*Re-exports of San Thomé Cocoa from Portugal.*

Destination.	1923. Tons.	1924. Tons.	1927. Tons.
Germany	5,400	9,840	4,920
Belgium	800	460	290
United States	1,580	470	420
France	370	360	1,050
Holland	6,010	5,280	3,800
United Kingdom	440	1,290	590
Italy	3,120	3,160	1,730
Other countries	210	230	240
Total	17,930	21,090	13,040

French Colonies and Mandated Territories.

102. Exports of raw cocoa from French dependencies are not yet of very great importance, combined exports from the colonies and mandated territories in Africa and elsewhere falling considerably short of the exports from Nigeria and amounting to barely one-tenth of Gold Coast exports. Up to the outbreak of the war the two main French producing colonies were Martinique and Guadeloupe, which together accounted for over 90 per cent. of French colonial production in the quinquennium 1900–04, and over 80 per cent. from 1910 to 1914. During the war period the export trade of French West and Equatorial Africa made substantial progress, and in the past few years, while Guadeloupe and Martinique have been exporting on the average rather less cocoa than earlier in the century, the Ivory Coast has developed to the point of exporting, in 1928, between 14,000 and 15,000 tons of raw cocoa. In addition, the French mandated territories of the Cameroon and Togo are being assisted to develop their cocoa production. In Table XXXIV below are shown exports of raw cocoa from the various French colonies and mandated territories in 1913, and from 1924 to 1927:—

TABLE XXXIV.—*Exports of Raw Cocoa from French Colonies and Mandated Territories.*

Exported from	1913.	1924.	1925.	1926.	1927.
	Tons.	Tons.	Tons.	Tons.	Tons.
Ivory Coast	45	4,230	6,180	6,730	9,600
Madagascar	35	130	155	120	145
Guadeloupe	895	690	640	600	710
Martinique	515	530	440	430	390
Guiana	15	20	5	15	15
Gabon	155	180	90	130	100
Dahomey	5	50	20	30	30
Togo	—	6,330	4,530	5,140	6,210
Cameroon	—	4,420	4,840	5,260	7,450
New Caledonia	5	1,270	790	800	430
Congo	—	—	50	35	90
Total	1,670	17,850	17,740	19,290	25,170

103. Cocoa produced in the French possessions enjoys a substantial preference over other cocoas in the French market, and practically all the exports from French colonies and mandated territories are exported to France. Notes on the principal producing areas among French dependencies are given in the following paragraphs.

Ivory Coast.

104. Cocoa was first introduced into the Ivory Coast about 1870, but made slow progress, and as recently as 1908 only a few scattered plantations existed, while the amount annually exported was negligible. The industry appears to be developing very much along the same lines as in the Gold Coast in the early stages, and there are prospects of future development continuing the parallel.

105. The coastal region is well adapted for the cultivation of the crop, although the natives are apparently less enterprising than their neighbours in the Gold Coast, and are reported to have resisted most strongly the earlier attempts to introduce the new crop. However, in 1912, owing to the crisis in rubber, the natives took up the cultivation more actively. In the early stages of the industry the French authorities had to take energetic measures to ensure that the natives did not abandon their plantations.

106. Demonstration farms have been established by the Government in several centres, and there is also a service of travelling inspectors who give advice, demonstrations, etc., to the natives. Unlike the Gold Coast and Nigeria, there are a number of European plantations in the Ivory Coast.

107. In considering the possibilities of the Ivory Coast, the relative scantiness of the population must be taken into account, for although the area suitable for the cultivation of cocoa is vast, it is sparsely populated, with 5·5 inhabitants per square kilometre against 10·2 in the Gold Coast and 20·7 in Nigeria. Although exports in 1928 amounted to less than 15,000 tons, a writer in the " Revue des Deux Mondes " in September, 1929, stated that in two years' time the Ivory Coast will supply the whole of the cocoa required annually for French consumption.

108. Well prepared Ivory Coast cocoa is equal in quality to good Gold Coast, San Thomé or Bahia cocoa. In 1924 a system of control for all cocoa marketed was inaugurated, and no cocoa is allowed to be sold or exported unless it conforms to various requirements as to condition, fermentation and taste.

109. A preference of the full tariff is given on cocoa entering from this colony into France.

French Togoland.

110. The French authorities are actively encouraging the cultivation of cocoa in this country, and the result of their efforts can be judged by the increase in exports during recent years.

111. This increase in production is principally due to the free distribution of cocoa plants from the Government nurseries which have been established at various centres. There can be little doubt that the continuation of this policy will lead to a further considerable increase in the cocoa exports within the next few years. The quality of the cocoa exported is controlled by the local Chamber of Commerce.

112. Exports of cocoa in 1928 amounted to 6,220 tons, almost all of which was destined for France.

French Cameroon.

113. The active co-operation of the French authorities with the native cocoa planters has been most successful in this country. As the following export figures show, there has been a substantial increase in production since 1920, and especially since 1923.

TABLE XXXV.—*Exports of Raw Cocoa from French Cameroon.*

Year.	Tons.	Year.	Tons.
1920	2,540	1925	4,840
1921	3,420	1926	5,260
1922	3,400	1927	7,450
1923	3,410	1928	7,200
1924	4,420		

Government fermentaries have been established, and the quality of the cocoa is good.

DAHOMEY.

114. Exports from Dahomey hitherto have been small, later figures than those given in Table XXXIV showing only 20 tons in 1928 and 30 tons in 1929, but there should be a substantial increase in the future, as a result of the policy of free distribution of plants and seeds which is being adopted by the French authorities here and elsewhere. Exports go entirely to France.

MARTINIQUE.

115. Although official attempts have been made to interest planters in cocoa production in Martinique, little success has been achieved, owing to the attention paid to the sugar cane, and little expansion is to be looked for in the near future. The total area devoted to cocoa is estimated at under 4,000 acres. Exports are consigned exclusively to France.

Fernando Po.

116. Cocoa has long been grown in Fernando Po, and it is generally agreed that the first cocoa introduced into the Gold Coast came thence. A native of the Gold Coast, who was returning home from Fernando Po in 1879, carried with him a few cocoa seeds, from which has developed the tremendous cocoa industry of British West Africa.

117. Most of the cocoa plantations are very old, and many planters are reported to be turning their attention to coffee owing to the difficulty of obtaining satisfactory yields of cocoa from these old plantations and the impossibility of starting a good growth of young cocoa.*

* Leonard I. Schwarz, U.S.A. Dept. of Agriculture in "Cocoa in West Africa."

118. Export figures of cocoa from Fernando Po are not available, but the imports thence into Spain, which comprise practically the total exports of the colony, will suffice to give an idea of the trend of production.

TABLE XXXVI.—*Imports of Raw Cocoa from Fernando Po into Spain.*

Year.	*Tons.*
1909-13 (average)	3,590
1922	5,920
1923	7,090
1924	9,480
1925	5,870
1926	5,670
1927	5,870
1928	8,420

119. Exports are on a substantially larger scale than before the war, but a tendency to decline is in evidence, so far as the figures given in the above table may be taken as a guide; but fluctuations from year to year, as in other producing countries, may well be caused by variation in the date of the harvest, or by the planters' practice of holding up supplies when price movements appear to justify it.

120. Almost the whole of the exports go to the Spanish market for which the cocoa is specially prepared. A very substantial rebate in the export duty is granted on all cocoa shipped from Fernando Po to Spanish ports.

Surinam (Dutch Guiana).

121. Cocoa has been exported from this country since 1725. The exports in 1895 reached 4,310 tons. At that time "witch broom" disease was noticed, and year after year the damage from this disease became more extensive until in 1904 not more than 830 tons were exported. However, means were found to control the disease, and production recovered until 1910, when over 2,000 tons were exported. Droughts in 1911 again caused a decline. Since the war, production has showed a steady falling off as the following table of exports will show :—

TABLE XXXVII.—*Exports of Raw Cocoa from Surinam.*

Year	*Exports. Tons.*
1909–13 (average)	1,580
1921	1,610
1922	1,540
1923	1,390
1924	730
1925	800
1926	130
1927	210
1928	250

122. Cultivation is difficult and costly owing to the plantations being situated along rivers subject to the tidal movement of the sea, which raises their level above that of the plantations at high tide. This necessitates the upkeep of strong dykes, and an elaborate system of drainage canals and sluices.

123. Almost the whole of the crop is exported to the Netherlands, but as the above figures show, the quantity exported is negligible in comparison with world supplies. Nor does there appear any likelihood of a recovery in production in Surinam in view of the difficulties with which production is faced, and the fact that many trees have been replaced by Liberian coffee.

New Hebrides.

124. Cocoa plantations in the New Hebrides are practically all in the hands of the French, who continue to plant up new areas. Exports expanded from 1,060 tons in 1923 to 2,340 tons in 1927; there was a set back in 1928 to 1,420 tons, but this was caused by two severe storms, and was not due to any decrease in cultivation. Exports for the years 1923 to 1928 (nearly all going to Australia) are given in following table :—

TABLE XXXVIII.—*Exports of Raw Cocoa from New Hebrides.*

Year.	*Tons.*
1923	1,062
1924	1,517
1925	1,495
1926	1,950
1927	2,344
1928	1,422

Other Producing Countries.

125. There are a number of other countries which produce cocoa in larger or smaller quantities. Among these may be mentioned :—

Dominica, which exported 305 tons of cocoa in 1927 and 166 tons in 1928, as compared with an average of 540 tons in the five years before the war.

British Honduras, where the cocoa tree grows wild. Cocoa has been cultivated in several places, but the output has declined steadily in recent years owing to neglect, which has been attributed to lack of knowledge and shortage of labour.

British Guiana, in which cocoa production, never very extensive, has shown a steady decline, with 1,200 acres under cultivation in 1928.

Belgian Congo, which exports between 800 and 900 tons of cocoa annually and where new plantations in combination with coffee and oil palm are being developed.

Dutch East Indies.—Java produces a small quantity of very choice cocoa, and exports roughly 1,000 tons per annum to the Netherlands. In the other Dutch possessions of Sumatra, Celebes, Borneo and Timor the cultivation of cocoa is in its initial stages.

126. In addition to the above, there are many countries which produce fairly considerable quantities of raw cocoa, but even so do not grow enough for their own requirements, and need to import from other larger producing countries. These include Mexico, with an annual production of about 1,400 tons ; the Philippines, with an annual output of about 1,000 tons ; Bolivia, producing about 2,000 tons annually ; Colombia, which produces about 5,000 tons per annum. There are also a number of other minor producers, some of which are exporters on a small scale, such as Guatemala, Nicaragua, Spanish Guinea, New Guinea and others which have not been dealt with in the preceding paragraphs. None of these is important in world trade.

127. Experiments in cocoa cultivation have been made in Fiji Islands, North Australia, Indo-China and the Portuguese Colonies in India, Timor and Kambing. Other countries which have been suggested as possibly suitable for the cultivation of cocoa are India, Straits Settlements, Malay States, Andaman and Nicobar Islands, Cayman, Turks and Caicos Islands, the Virgin Islands, Montserrat, Siam and Formosa.

IMPORTS.

United Kingdom.

128. The United Kingdom is the third largest importer of cocoa in the world, ranking next in importance to the United States and Germany. Retained imports have increased enormously since before the war, and are now about double the 1913 figure ; in the four years ended 1928 the quantity retained for home consumption was practically uniform at slightly over 55,000 tons, whereas in 1913 it was only 27,000 tons. The imports of raw cocoa entered for home consumption for the years 1920 to 1929 in comparison with 1913 are shown in Table XXXIX below :—

TABLE XXXIX.—*Imports of Raw Cocoa entered for Home Consumption in the United Kingdom.*

Year.	Foreign.	Prop. of Total.	Empire.	Prop. of Total.	Total.
	Tons.	Per cent.	Tons.	Per cent.	Tons.
1913	(a)	(a)	(a)	(a)	27,090
1920	6,955	14	43,695	86	50,650
1921	4,745	10	41,105	90	45,850
1922	3,215	6	47,315	94	50,530
1923	3,550	7	46,250	93	49,800
1924	4,260	8	47,580	92	51,840
1925	4,745	8	51,560	92	56,305
1926	4,465	8	51,945	92	56,410
1927	3,200	6	52,640	94	55,840
1928	3,370	6	52,180	94	55,550
1929	(a)	(a)	(a)	(a)	57,500

(a) Not available.

129. The above figures show retained imports at full and preferential rate of duty, and may be taken as an indication of Empire and foreign retained imports. No allowance has been made for exports or imports of cocoa preparations, and the figures, therefore, do not show domestic consumption of cocoa and its products.

130. The table reveals that the retained imports of Empire-produced raw cocoa have considerably increased since 1920, having risen from 43,700 tons, or 86 per cent. of the total quantity imported,

to 52,200 tons, or 94 per cent. in 1928. Meanwhile, the produce obtained from foreign sources of supply has declined from 7,000 to 3,400 tons.

131. No figures are available of the actual retained imports of Empire cocoa prior to 1920, but the import statistics show that 53 per cent. of the imports during 1913 were of Empire origin. This remarkable change in the proportion of the raw product obtained from the Empire, that is, from one-half of the total to nearly the whole, is due largely to two factors—the establishment of a preferential tariff and the increased output from the Gold Coast.

132. Of the imports of cocoa in 1928, British West Africa supplied 87 per cent. of the total, while British West Indies was the second most important source of supply with a share of 6 per cent., the only other Empire countries with a contribution of any significance being Ceylon, and Nauru and Western Samoa.

133. Imports from British West Africa show no signs of decreasing. In 1928 over 55,000 tons were received from this source, which was the highest figure reached since 1921, while in 1929 imports reached the striking total of 69,000 tons. In 1913 only 9,000 tons were received from this area.

134. Imports from the West Indies have shown a considerable falling off since 1919. The average imports from these islands during the quinquennium 1920–1924 amounted to 7,800 tons, while the 1929 imports amounted to only 4,000 tons.

135. Imports from foreign countries were small in comparison with those from the two main Empire sources of supply. Venezuela was the principal foreign shipper in 1928, followed by Ecuador and Brazil. In fact, these three countries are the only important suppliers outside the British Empire, and imports from them have diminished. The average imports from these three countries for the period 1919–24 amounted to 6,400 tons, compared with 2,800 tons in 1928. Brazil, which in 1913 was one of the most important suppliers with a contribution of 5,800 tons, or one-sixth of the total imports, sent only 800 tons in 1928. Imports from Portugal (San Thomé cocoa), which in 1913 amounted to 1,100 tons, have now dwindled to 140 tons.

136. In the following table are shown the imports of cocoa into the United Kingdom from 1924 to 1929 in comparison with 1913, and also the quantities received from each of the principal countries of consignment.

TABLE XL.—*Imports of Raw Cocoa into the United Kingdom.*

Imported from	1913. (a)	1924.	1925.	1926.	1927.	1928.	1929.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
British West Africa ..	9,070	46,750	53,780	50,540	54,400	55,050	68,750
British West Indies ..	7,160	4,980	5,980	4,410	4,510	3,880	4,050
Ceylon	2,250	1,270	1,150	570	770	510	730
Nauru and Western Samoa	—	640	430	90	150	190	} 410
Other Empire countries	60	70	120	20	40	50	
Ecuador	3,980	1,490	2,490	1,160	1,590	840	890
Venezuela	320	950	1,400	800	1,170	1,160	980
Brazil	5,760	310	1,170	940	530	810	
Portugal	1,140	640	140	230	270	140	
Portuguese West Africa	190	400	30	160	110	40	
Netherlands	270	160	150	200	90	200	
Panama	30	90	110	80	80	120	} 1,600
Costa Rica	240	40	90	70	80	120	
German Possessions in the Pacific.	170	—	—	—	—	—	
German West Africa ..	710	—	—	—	—	—	
Other foreign countries	3,630(b)	530	260	190	270	220	
Total Empire countries	18,540	53,710	61,460	55,630	59,870	59,680	73,940
Total foreign countries	16,440	4,610	5,840	3,830	4,190	3,650	3,470
Total	34,980	58,320	67,300	59,460	64,060	63,330	77,410

(a) Imports include those into the Irish Free State.
(b) "Other foreign countries" in 1913 included Germany, 1,560 tons; Belgium, 870 tons; France, 440 tons; and San Domingo, 330 tons.

137. The season of maximum imports of West African raw cocoa into the United Kingdom extends from November to April, with the peak of the season about January. From May to October imports from British West Africa are very small. Imports from the British West Indies are at their highest from about February to May or June, while May and June see the peak of the imports from Ecuador and Venezuela. In Table XLI below are shown

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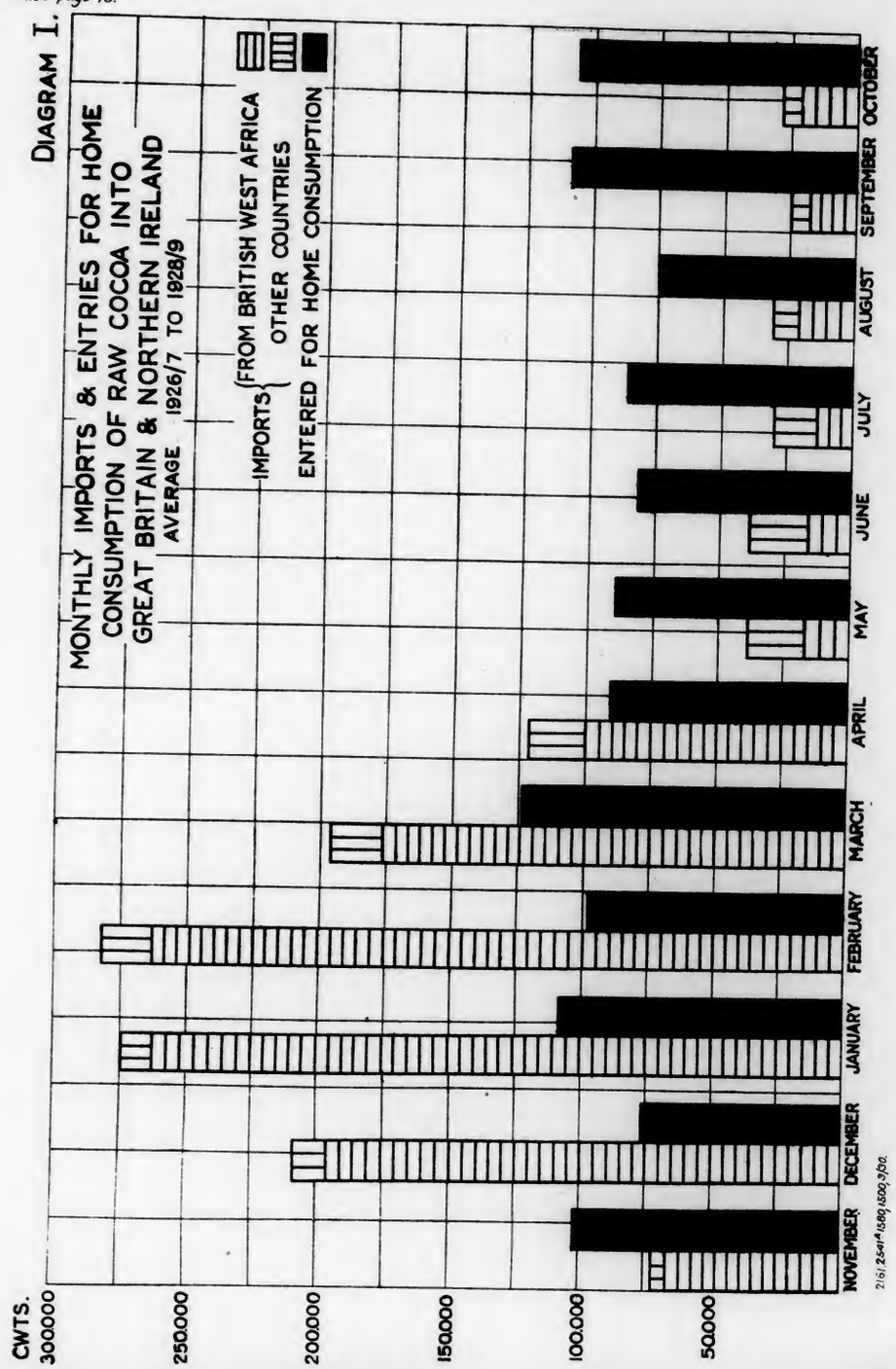
DIAGRAM I.



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imports from the main countries of consignment in each month from November, 1926, to October, 1929, and, in the last column the total quantities of raw cocoa entered for home consumption each month. The average figures for the past three years are shown graphically in Diagram I.

TABLE XLI.—*Imports of Raw Cocoa into the United Kingdom from November, 1926, to October, 1929.*

Month.	Venezuela.	Ecuador.	British West Africa.	Ceylon.	British West Indies.	Other Countries.	Total.	Entered for Home Consumption.
	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.
1926–27.								
November ..	·5	—	47·1	·3	—	0·9	48·8	128·5
December ..	1·3	—	198·3	1·1	3·4	2·7	206·8	90·8
January ..	·2	1·7	239·3	1·0	4·8	5·1	252·1	112·0
February ..	·6	3·1	188·2	1·6	12·6	1·1	207·2	122·7
March ..	2·3	0·9	145·8	2·4	10·0	4·8	166·2	139·7
April	2·7	1·2	103·5	3·8	18·5	3·1	132·8	70·1
May	4·8	5·6	8·6	1·6	13·8	1·2	35·6	76·1
June	2·8	10·7	4·4	0·5	6·9	2·6	27·9	67·9
July	1·0	6·1	13·5	1·6	7·1	1·5	30·8	70·6
August ..	2·1	1·8	36·4	1·3	5·7	1·5	48·8	93·4
September ..	1·7	0·8	27·9	0·5	0·5	2·0	33·4	102·4
October ..	2·3	0·3	42·6	0·5	4·3	3·5	53·5	93·1
1927–28.								
November ..	·9	—	74·0	·4	3·2	3·8	82·3	90·3
December ..	1·0	0·4	215·4	1·1	4·8	3·8	226·5	79·3
January ..	·6	·5	226·6	2·1	4·1	3·5	237·4	108·8
February ..	1·4	·5	208·9	1·2	11·2	3·5	226·7	83·3
March ..	0·7	1·0	203·6	1·0	7·2	4·9	218·4	122·7
April	1·5	1·8	104·9	0·7	9·5	1·1	119·5	96·5
May	·8	2·0	13·1	0·4	11·1	2·2	29·6	87·9
June	2·5	7·7	21·8	—	13·0	4·0	49·0	84·6
July	4·3	1·8	24·3	0·9	5·9	1·3	38·5	87·9
August ..	2·4	1·0	17·9	0·7	3·0	1·3	26·3	74·8
September ..	3·7	0·1	20·4	0·5	1·5	2·7	28·9	103·3
October ..	2·3	—	6·8	0·4	3·1	2·5	15·1	116·2
1928–29.								
November ..	1·1	1·3	75·9	·5	·9	4·6	84·3	86·0
December ..	2·9	0·3	174·7	2·1	4·0	7·3	191·3	59·8
January ..	·8	0·1	318·5	2·7	5·0	7·3	334·4	105·2
February ..	·9	1·4	390·1	2·7	11·1	6·2	412·4	83·7
March ..	1·9	0·5	176·1	2·4	19·9	3·6	204·4	110·0
April	2·3	0·3	91·4	1·5	12·1	5·8	113·4	104·7
May	1·5	8·0	28·9	1·2	5·8	3·6	49·0	105·5
June	2·3	4·6	19·9	0·5	6·4	2·1	35·8	92·3
July	3·1	2·1	0·4	0·6	6·9	5·3	18·4	99·7
August ..	2·4	0·5	8·0	1·0	3·6	1·7	17·2	57·2
September ..	0·8	0·3	4·8	0·3	2·6	4·2	13·0	111·4
October ..	1·8	0·3	12·4	0·2	1·6	1·3	17·6	106·4

(39884)

138. Consumption of raw cocoa, as shown in the last column of the above table, is fairly uniform over the year, although tending to rise during the winter and spring, and fall during the summer months. The seasonal nature of imports thus involves an accumulation of stocks of raw cocoa in bonded warehouses in this country. During the past three years the average bonded stocks on the 30th April have amounted to 41,000 tons, while seven months later, on 30th November, the average stocks have fallen to 14,000 tons.

139. Almost the whole of the increase in the imports of raw cocoa into the United Kingdom has been accounted for by increased domestic consumption of cocoa products. Re-exports of raw cocoa have been very little, if at all, heavier in recent years than in the years before the war, and the export trade in British manufactured cocoa products, although greater than in pre-war years, has only increased to a very moderate extent. Total exports of cocoa preparations, manufactured in the United Kingdom, amounted in 1913 to 165,000 cwts., and in 1912 to 158,000 cwts., these figures including cocoa butter as well as cocoa powder and chocolate sweetened and unsweetened. Total exports of cocoa preparations (including cocoa butter) in the past three years have amounted to 190,000 cwts. in 1926, 169,000 cwts. in 1927, and 157,000 cwts. in 1928, exports to the Irish Free State being excluded from these figures.

140. Unfortunately, pre-war export figures did not distinguish between the various kinds of cocoa preparations. Present day exports consist very largely of " preparations without sugar " and of chocolate confectionery. Exports of the principal cocoa products from the United Kingdom in recent years are given in the following table :—

TABLE XLII.—*Exports of Cocoa Preparations from the United Kingdom.*

Description.	1924.	1925.	1926.	1927.	1928.
	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.
Without sugar	72·5	99·4	101·4	90·7	92·9
Bars and blocks (containing sugar)	24·4	17·4	19·2	22·3	24·4
Confectionery (containing sugar) ..	57·9	56·8	69·2	64·0	51·1
Other cocoa preparations (with sugar)	3·6	2·8	3·2	4·0	3·0
Cocoa butter..	28·4	15·6	27·4	16·5	15·5

The above figures show that the export trade in cocoa preparations has recently been about maintained, but there are no signs of material increase. Exports of cocoa preparations without sugar in 1929 totalled 100,900 cwts. and with sugar 84,800 cwts., thus showing a very slight recovery from the fall of 1928.

141. About 60 per cent. of the exports of cocoa preparations are shipped to the Empire, with the Irish Free State, and the Union of South Africa as leading purchasers, followed by India, New Zealand, Australia, Channel Islands and Canada. In 1913 nearly 90 per cent. of the cocoa preparations exported were shipped to Empire countries, a post-war decrease in exports to these countries being counter-balanced by increased consignments to the Continent. But exports to foreign countries are mainly of cocoa preparations without sugar, and appear to consist chiefly of the cocoa powder obtained as a by-product from the extraction of cocoa butter. Of the 92,900 cwts. of " cocoa preparations not containing sugar" exported in 1928, about 65,500 cwts. were consigned to foreign countries, with an average declared value of about 19s. 6d. per cwt., and of this total the Netherlands took 55,800 cwts. valued at only 12s. 8d. per cwt. The remaining 27,400 cwts., consigned to Empire countries, were valued at £7 2*s*. per cwt. Apart from exports of low priced cocoa preparations without sugar, the Empire was still, in 1928, taking 85 per cent. of the United Kingdom's exports of cocoa preparations.

142. It may be here noted that in contrast to its export trade in manufactured cocoa preparations, the United Kingdom is also a large importer. In fact, imports of cocoa preparations are rather in excess of exports, figures for recent years being shown in Table XLIII below :—

TABLE XLIII.—*Net Imports of Cocoa Preparations into the United Kingdom.*

Description.	1913.	1924.	1925.	1926.	1927.	1928.
	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.
Without sugar	246·5	20·9	22·2	17·4	22·2	10·6
Bars and blocks (containing sugar).		107·4	152·9	81·5	91·6	88·9
Confectionery (containing sugar).		21·3	12·0	79·1	73·1	70·7
Other cocoa preparations (containing sugar).		9·5	13·2	25·1	34·1	33·9
Total cocoa preparations	246·5	159·1	200·3	203·1	221·0	204·1
Cocoa butter	18·2	32·9	27·8	26·6	46·1	60·2

143. Cocoa butter imports are obtained almost entirely from the Netherlands, which also supplies the bulk of the " cocoa preparations without sugar " (of the average value in 1928 of £3 8s. per cwt. as compared with United Kingdom exports to the Netherlands in this classification of less than 13*s.* per cwt.). Switzerland furnishes the bulk of the chocolate in bars and blocks, and Belgium the other sorts containing sugar, while these two countries share with the Netherlands the trade in chocolate confectionery.

Canada.

144. The consumption of cocoa in Canada has shown a fairly steadily increasing tendency during recent years, and there has been a marked increase compared with the pre-war figures. The imports for the years 1924 to 1928 and the average for 1909–1913 were as follows :—

TABLE XLIV.—*Imports of Raw Cocoa into Canada.*

	Tons.		*Tons.*
Average 1909–13 ..	1,890	Calendar year 1926 ..	6,840
Calendar year 1924 ..	5,340	,, ,, 1927 ..	6,740
,, ,, 1925 ..	6,340	,, ,, 1928 ..	7,490

145. The following table shows the imports into Canada according to countries whence consigned. It will be noticed that a considerable proportion of the supplies are imported via the United Kingdom and the United States, and in the circumstances it is difficult to arrive at any estimates of the proportions of the different classes of cocoa in the total supply. Imports of cocoa from the British West Indies are rapidly increasing since the trade agreement between the two countries in 1926, under which British West Indian cocoa is imported into Canada duty free.

TABLE XLV.—*Imports of Raw Cocoa into Canada (years ended 31st March).*

Imported from	1923.	1924.	1925.	1926.	1927.	1928.	1929.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
United Kingdom ..	1,110	1,270	1,500	2,240	1,750	1,790	700
United States	2,100	2,330	1,230	1,720	1,610	1,370	1,410
British West Africa ..	1,070	1,720	350	2,030	1,440	1,720	1,050
British West Indies ..	2,120	2,220	1,270	1,170	990	2,790	3,630
Ceylon	230	230	160	140	260	250	250
Venezuela	—	40	10	10	10	10	} 10
Other countries ..	550	—	20	100	90	10	
Total	7,180	7,810	4,540	7,410	6,150	7,940	7,050

146. Imports of cocoa preparations are shown below. The export returns of the Canadian Government do not distinguish any kind of cocoa preparations :—

TABLE XLVI.—*Imports of Cocoa Preparations into Canada.*

Description.	1924–25.	1925–26.	1926–27.	1927–28.	1928–29.
	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.
Cocoa paste (in blocks or cakes)	1·2	1·6	1·5	1·6	1·9
Cocoa or chocolate powder ..	11·3	15·7	11·5	10·9	15·0
Other cocoa preparations ..	0·5	0·8	1·2	0·9	1·7
Chocolate confectionery ..	3·4	7·0	18·4	10·0	5·9
Cocoa butter	46·1	46·0	46·4	48·3	45·3

147. Of these imports Holland supplies the bulk of the cocoa butter, followed by the United States and the United Kingdom ; the same three countries are the chief sources of cocoa powder, and the United Kingdom, the United States, Holland and Switzerland furnish most of the chocolate confectionery.

Australia.

148. Imports of cocoa into Australia in 1928 were eight times the average pre-war imports. The quantities imported in the years 1924 to 1928 and the average for 1909 to 1913 are given in the following table. The exports of raw cocoa (mainly to New Zealand), which in some years are considerable, fell in 1927–28 to very small dimensions. These figures are also shown below :—

TABLE XLVII.—*Imports of Raw Cocoa into Australia.*

Year.	Imports.	Re-exports.
	Tons.	Tons.
1909–13 (Average)	550	21
1923–24	4,240	109
1924–25	4,280	302
1925–26	4,700	99
1926–27	3,760	228
1927–28	4,510	20

149. British West Africa is the principal supplier, although a large proportion comes from the British West Indies, and altogether a large number of countries figure in the import returns. The imports giving details of the quantities from the various consigning countries for the years 1926 to 1928 are shown below :—

TABLE XLVIII.—*Imports of Raw Cocoa Beans and Shells into Australia (year ended 30th June).*

Imported from	1925–26.	1926–27.	1927–28.
	Tons.	Tons.	Tons.
British West Africa	1,700	1,080	1,760
West Indies	1,040	830	1,340
Ecuador	430	160	210
Pacific Islands (New Hebrides) ..	380	660	340
Brazil	260	250	220
Ceylon	220	300	190
Venezuela	190	50	70
San Thomé	140	170	150
New Guinea	70	60	60
U.S.A.	65	35	70
Costa Rica	50	20	—
French West Africa	40	—	—
Netherland East Indies	30	60	10
South Africa	30	60	—
Panama	25	15	10
Portuguese West Africa	20	—	—
Other countries	10	10	80
Total	4,700	3,760	4,510

150. Australia has established a considerable manufacturing industry in cocoa products, and in addition to raw cocoa, imports over 1,000 tons of cocoa butter annually. Exports in 1927–1928 exceeded by a considerable margin the import trade in these commodities, but, unfortunately, the export trade in confectionery does not distinguish between chocolate and other sorts. Until a few years ago, exports of prepared cocoa for potable use also exceeded imports, but the export trade has declined very substantially. New Zealand takes the bulk of these exports. Imports and exports in recent years are shown below :—

TABLE XLIX.–*Australian Imports and Exports of Cocoa Preparations.*

Description.	1925–26.		1926–27.		1927–28.	
	Imports.	Exports.	Imports.	Exports.	Imports.	Exports.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Confectionery—						
Chocolate ..	167	636	146	673	137	983
Other	451		499		525	
Cocoa mass or slab	128	—	169	—	85	—
Cocoa or chocolate for potable use.	152	23	149	31	124	21
Cocoa butter ..	1,144	—	1,277	—	1,271	1

New Zealand.

151. Although New Zealand is a comparatively small importer of cocoa, its imports are substantially larger than in 1913. Its supplies are drawn from many different sources, and the following table of imports in 1913 and from 1925 to 1928 shows that the market does not appear to be dominated by any particular country. There was a considerable drop in the quantity imported during 1927, which was, however, followed by a complete recovery in 1928.

TABLE L.—*Imports of Raw Cocoa into New Zealand.*

Imported from	1913.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.
Western Samoa	—	135	60	100	120
British West Indies	30	85	110	100	230
Ceylon	80	—	20	30	10
British West Africa	—	—	20	—	30
Other British countries	70(*a*)	5	10	—	—
New Hebrides	—	170	280	40	110
Ecuador	—	50	30	40	90
Brazil	—	70	60	30	100
U.S.A.	10	80	70	20	20
Venezuela	—	20	20	10	20
Other foreign countries	35	5	10	10	10
Total	225	620	690	380	740

(*a*) Chiefly United Kingdom.

152. New Zealand imports fair quantities of cocoa products and cocoa butter, and is apparently developing a manufacturing industry to meet her own needs for prepared chocolate. Exports of cocoa preparations are negligible.

TABLE LI.—*Imports of Cocoa Preparations into New Zealand.*

Description.	1913.	1925.	1926.	1927.	1928.
	000 cwt.	000 cwt.	000 cwt.	000 cwt.	000 cwt.
Cocoa and chocolate	5·5	6·2	5·7	6·1	6·5
Chocolate—					
Confectionery in plain packages.	2·2	8·2	8·4	7·9	12·3
In fancy packages	(a)	(a)	(a)	(a)	
Cocoa butter	5·8	14·5	14·8	14·7	20·1

(a) Imports by value only—£83,000 in 1913; £131,000 in 1925; £117,000 in 1926; £113,000 in 1927.

153. Of the above imports the Netherlands supply most of the cocoa butter, the United Kingdom and Australia share the bulk of the confectionery trade, followed by Canada and Switzerland, and the United Kingdom is the chief source of cocoa and chocolate.

Union of South Africa.

154. Imports of cocoa beans into the Union of South Africa are mainly from the British West Indies and Portuguese West Africa, but the quantities imported have been irregular in recent years. Table LII gives the imports from 1924 to 1928 from the principal consigning countries :—

TABLE LII.—*Imports of Raw Cocoa into the Union of South Africa.*

Imported from	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.
British West Indies	88	12	9	97	68
Portugal	—	—	—	49	—
Portuguese West Africa ..	89	7	127	28	29
Guatemala	—	1	—	28	—
Ecuador	14	5	12	15	12
Ceylon	—	2	8	13	14
Brazil	—	1	2	5	10
British West Africa	11	12	8	1	24
Other countries	60	1	9	18	42
Total	262	41	175	254	199

155. Fair quantities of cocoa products are annually received by the Union of South Africa, mainly from the United Kingdom and the Netherlands. The imports for the years 1924 to 1928 are shown in the following table :—

TABLE LIII.—*Imports of Cocoa Preparations into the Union of South Africa.*

Description.	1924.	1925.	1926.	1927.	1928.
	000 cwt.	000 cwt.	000 cwt.	000 cwt.	000 cwt.
Block chocolate, mass, paste and slab unsweetened.	0·7	1·1	1·4	2·1	2·5
Other unsweetened cocoa ..	5·8	6·1	5·7	5·8	5·7
Sweetened cocoa for confectionery industry.	—	0·8	1·3	2·4	1·8
Chocolate confectionery ..	5·8	11·4	17·1	18·7	17·6
Cocoa butter	2·6	2·2	2·6	3·1	3·6

Irish Free State.

156. Imports of raw cocoa into the Irish Free State have shown a marked increase in each of the past five years, and the quantity obtained in 1928 was more than two and a half times as heavy as in 1924. Practically the whole of these supplies are represented by re-exports from the United Kingdom, which supplied 240 out of the 244 tons imported in 1927, and the whole of the imports in 1928. Imports in each of the five years 1924 to 1928 are shown in Table LIV below :—

TABLE LIV.—*Imports of Raw Cocoa into the Irish Free State.*

Year.	From all Countries.	From the United Kingdom.
	Tons.	Tons.
1924	109	99
1925	179	172
1926	187	176
1927	244	240
1928	283	283

157. Although the Irish Free State is only a very moderate importer of raw cocoa, it is a substantial customer for cocoa preparations, which are also nearly all obtained from the United Kingdom,

and comparatively small quantities from the Netherlands. There has, however, been a considerable decline in the quantities imported since 1924, although there was a slight recovery in 1928. Details of imports are given in Table LV, but the Irish Free State trade returns do not show separately the various kinds of cocoa preparations included in the totals.

TABLE LV.—*Imports of Cocoa Preparations into the Irish Free State.*

Year.	From All Countries.	From the United Kingdom.	From the Netherlands.
	Tons.	Tons.	Tons.
1924..	2,641	2,485	143
1925..	2,122	1,939	163
1926..	1,772	1,611	136
1927..	1,672	1,529	135
1928..	1,740	1,598	137

United States.

158. By far the largest consumer of cocoa in the world is the United States, which imported 170,000 tons in 1928, or more than the combined imports of its two nearest rivals, Germany, which received 75,000 tons, and the United Kingdom, which purchased 65,000 tons in the same year. The consumption of cocoa in the United States has more than trebled since before the war. Whereas in 1913 about 60,000 tons were imported, the average imports for the quinquennium 1925-1929 amounted to nearly 190,000 tons. "Prohibition" and the high standard of living enjoyed by the people during and after the war are major contributing factors to the increased consumption.

159. The United States usually draws approximately one-third of its supplies of cocoa from British West Africa, but in 1929 obtained over 40 per cent. from that source (as compared with the United Kingdom, which takes almost 90 per cent. of its supplies from the same countries). Brazil is the next important source of supply; over 46,000 tons were received from this country in 1927, and 41,000 tons in 1929. These were record years, as generally imports from Brazil do not exceed 35,000 tons, or approximately one-fifth of the total imports of cocoa.

160. Owing to the close economic relations between the two countries, the United States takes practically the total output of San Domingo. Nearly 21,000 tons were imported from there during 1929, or about the average imports of the preceding five years.

161. Imports from the British West Indies amounted to over 20,000 tons in 1929 compared with 17,000 tons in the previous year. These islands are the main source of supply for the finer grades of cocoa. Other important supplies of fine cocoa came from Venezuela and Ecuador, the combined imports from these two countries amounting to 16,500 tons. At the same time it is noticeable that of the total United States imports almost 17 per cent. came from the British West Indies, Ecuador and Venezuela, and can be classed as of the "finer" types of cocoa. Of United Kingdom imports only about 10 per cent. can be placed in that category.

162. In the following table are shown the imports of cocoa into the United States, detailing the various countries of consignment during the five years 1925 to 1929 as compared with 1913.

LVI.—*Imports of Raw Cocoa into the United States of America.*

Imported from	1913.*	1925.	1926.	1927.	1928.	1929.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
British West Africa	20	60,010	68,480	63,670	56,130	94,780
Brazil	6,410	32,330	40,700	46,250	33,430	41,080
British West Indies	13,210	16,330	20,030	14,720	17,360	20,790
Germany	2,040	2,910	6,930	8,230	9,910	8,470
Ecuador	6,800	14,140	9,410	7,700	8,380	6,980
Venezuela ..	1,850	8,690	5,770	5,690	7,120	9,650
United Kingdom..	5,210	4,780	7,120	3,770	5,510	7,540
Netherlands ..	630	2,150	3,250	5,700	4,570	3,260
San Domingo ..	12,160	20,740	19,290	24,370	17,780	20,680
Haiti	620	1,180	980	740	1,510	1,630
Portugal	10,290	720	1,270	830	990	3,310
Costa Rica ..	30	650	1,590	1,190	1,790	(*a*)
Panama	40	2,940	1,140	2,060	3,130	(*a*)
Cuba	1,190	—	800	1,090	80	(*a*)
Colombia	20	440	170	410	150	(*a*)
Surinam	1,050	700	230	160	320	(*a*)
Other countries ..	960	1,830	3,150	3,150	1,140	8,430
Total ..	62,530	170,540	190,310	189,730	169,300	226,600

(*a*) Included in "Other countries." * Fiscal year ended 30th June, 1913.

163. As in the case of the United Kingdom, the enormous increase in imports of raw cocoa in comparison with pre-war days has been absorbed almost wholly by the increased domestic consumption of cocoa products. No figures are available of exports before the war, but even now the total exports of cocoa products amount to only a very small fraction of the United States output. Exports of the various cocoa preparations in the years 1924 to 1928 have been as follows :—

TABLE LVII.—*Exports of Cocoa Preparations from the United States.*

Description.	1924.	1925.	1926.	1927.	1928.
	000 cwt.	000 cwt.	000 cwt.	000 cwt.	000 cwt
Cocoa powder	37·5	31	21	31	19
Chocolate	13·5	14	10·5	8·5	8
Chocolate confectionery ..	(*a*)	24	18	18	18·5
Cocoa butter	7·5	22	6	3	21·5

(*a*) Not available.

164. Exports of cocoa preparations from the United States appear to be declining. The chief markets are Canada, Cuba, the Philippines, Panama, Newfoundland and the Netherlands (for cocoa powder), and in some of these countries, notably Canada, and the Philippines, the cocoa manufacturing industry seems to be developing.

165. There is a fair and increasing import trade in cocoa preparations into the United States, recent import figures being shown in the following table. No information is available as to imports of chocolate confectionery.

TABLE LVIII.—*Imports of Cocoa Preparations into the United States.*

Description.	1924.	1925.	1926.	1927.	1928.
	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.
Cocoa prepared	22·2	28·4	34·9	30·6	44·2
Chocolate	11·3	17·0	26·1	23·5	39·8
Cocoa butter	15·9	0·6	0·8	1·7	0·2

166. Almost all the small quantity of cocoa butter imported is obtained from Holland, and the same country supplies the bulk of the prepared cocoa, and is the chief supplier of chocolate, although Germany was in 1927 a close second ; those two countries, with Belgium, account for 80 per cent. of the United States imports of chocolate.

Germany.

167. Germany is the second largest importer of cocoa in the world occupying second place only to the United States. The average imports of cocoa for the quinquennium 1923–27 amounted to 69,000 tons, and in 1928 were 9 per cent. above this average, as will be seen from the table of imports on page 62.

168. About 70 per cent. of the total imports are drawn from British West Africa, and the average imports from that source during the period 1923–1927 amounted to 49,000 tons, while the figures for 1928 were well above the average, amounting to 54,000 tons. Brazil comes next in importance, although imports have declined since 1922, but the 1928 figures show a slight recovery. Imports from Portuguese West Africa, which before the war ranked next in importance to British West Africa as a source of supply, have steadily decreased, amounting to only 3,700 tons in 1928 compared with 11,300 tons in 1913 and 8,500 tons in 1922.

169. Comparatively very small quantities are imported from countries producing the finer grades of cocoa. The decline in imports from the British West Indies is pronounced, and although supplies from Ecuador and Venezuela are steadier, neither country in recent years has reached its pre-war level. Altogether less than 10 per cent. of cocoa imports appear to consist of the recognised finer descriptions.

170. The imports from the various countries of consignment in the years 1924 to 1928, in comparison with 1913 are shown below :—

TABLE LIX.—*Imports of Raw Cocoa into Germany.*

Imported from	1913.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
British West Africa ..	16,330	60,100	55,180	44,360	51,970	54,010
Brazil	6,210	9,000	8,750	4,340	4,640	5,880
Portuguese West Africa ..	11,270	5,430	4,170	4,570	4,210	3,690
Ecuador	7,010	3,820	3,710	2,250	1,980	3,650
Venezuela	1,820	2,520	1,790	1,120	1,470	1,730
Cameroon	1,460	730	740	1,060	1,290	1,510
U.S.A.*	40	140	210	70	30	1,400
Guadeloupe	†	80	230	80	40	1,200
Dutch Guiana	560	920	1,930	1,040	970	870
British India and Ceylon ..	460	970	620	460	520	620
Costa Rica	10	70	240	220	250	230
Haiti	310	90	180	110	170	170
British West Indies ..	1,700	2,090	1,460	670	1,070	†
Other countries	3,950	470	90	130	730	80
Total	51,130	86,430	79,300	60,480	69,340	75,040

* Including Philippines, Panama Canal Zone and Porto Rico.
† Included in "Other countries."

171. Germany's export trade in cocoa preparations is small compared with that of Holland, Switzerland and the United Kingdom, but there has been an appreciable increase in the past few years and exports of manufactures other than powder were in 1928 larger than in 1913. Exports in 1913 and in recent years of the various cocoa products are shown below.

TABLE LX.—*Exports of Cocoa Preparations from Germany.*

Description.	1913.	1924.	1925.	1926.	1927.	1928.
	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.
Cocoa paste	22·7	8·1	28·6	34·1	7·6	35·3
Cocoa powder	22·0	2·0	1·8	2·8	1·6	4·0
Chocolate	19·0	12·6	13·3	13·7	16·6	24·9
Other manufactures (*a*) ..	13·2	8·1	7·5	6·9	11·8	13·5
Cocoa butter	39·6	105·0	26·5	9·4	35·3	27·2

(*a*) Goods made from cocoa paste, cocoa powder, chocolate and chocolate substitutes; acorn cocoa, oatmeal cocoa, etc.

172. The bulk of the cocoa butter is exported to Holland and Belgium, while the United States is the chief market for cocoa paste, powder and chocolate. Germany's import trade in cocoa preparations amounted to about 40,000 cwts. in 1928.

Netherlands.

173. Holland is an important market for cocoa, the imports into that country almost equalling those into the United Kingdom, although between 10 and 20 per cent. of the total imports of raw cocoa are re-exported in the raw state. In the following table are shown the imports into the Netherlands giving details of consigning countries in 1913 and 1925 to 1929 :—

TABLE LXI.—*Imports of Raw Cocoa into the Netherlands.*

Imported from	1913.	1925.	1926.	1927.	1928.	1929.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
British West Africa ..	100	34,570	35,870	33,060	41,160	44,400
Brazil	90	3,930	2,630	3,350	3,240	1,250
Portugal	8,380	2,950	3,520	1,700	1,980	2,730
Dutch Indies	2,090	910	630	470	1,140	1,000
U.S.A.	40	190	430	250	1,040	270
Ecuador	1,040*	1,490	1,600	1,130	780	270
Venezuela		530	320	380	370	460
United Kingdom	9,310	2,910	1,350	1,070	770	890
British West Indies ..	—	590	830	1,030	770	(*a*)
Germany	11,430	2,570	1,700	1,560	710	1,430
Belgium	1,830	190	70	130	100	(*a*)
France	6,910	190	440	460	90	440
Other countries	1,290	1,230	1,400	1,450	880	1,940
Total	42,510	52,250	50,790	46,040	53,030	55,080
Re-exports	13,000	8,830	7,340	6,910	6,270	6,320

* Includes Colombia. (*a*) Included in "Other countries."

174. The foregoing table shows that the retained imports for 1929 were well above the average, but compared with other important consuming countries the increase in cocoa imports into Holland since 1913 has been comparatively small. British West Africa supplied 81 per cent. of the total imports in 1929, compared with 66 per cent. in 1925. There has been a steady growth in the imports from these countries,

this being mainly due to the large export trade carried on by Holland in cocoa butter and cocoa powder, in the manufacture of which increasing use seems to be made of West African cocoa. The only other important sources are Portugal (San Thomé) and Brazil. Imports from the former country in 1927 and 1928 dwindled to less than one-quarter of the 1913 figure while imports from Brazil have considerably increased since pre-war years, but fell in 1929.

175. As regards the superior grades of cocoa, imports are relatively unimportant. Imports from the Dutch Indies have not recovered their pre-war importance, having dropped from 2,100 tons in 1913 to 470 in 1927, but the figures for 1928 and 1929 seem to point to a recovery of the cocoa trade with these islands. There has been a steady drop in the import figures from both Ecuador and Venezuela and the combined imports from the two countries were only 730 tons in 1929.

176. Holland has also an important import and export trade in cocoa husks, the totals in the five years 1925 to 1929 being as follows :—

TABLE LXII.—*Trade of Netherlands in Cocoa Husks and Waste Cocoa Products.*

—	1925.	1926.	1927.	1928.	1929.
	Tons.	Tons.	Tons.	Tons.	Tons.
Imports	5,730	5,320	11,940	13,380	13,960
Exports	4,210	6,670	8,790	9,290	14,830

177. Prior to 1929 these products were classified as cocoa husks, but last year they were separated into "cocoa husks" and "waste products from cocoa and chocolate manufactures (cocoa cakes, etc.)." This re-classification shows that in 1929 only 4,140 tons, or 30 per cent. of the imports, and 2,500 tons, or 17 per cent. of the exports, consisted of cocoa husks, the larger proportion in each case being other waste products. Imports are mostly obtained from the United States, the United Kingdom, Germany and Belgium, and exports are consigned to the United States, Switzerland, France, Belgium, and the United Kingdom. Although the volume of the trade is large, its value is relatively unimportant.

178. The Netherlands is easily the world's largest exporter of cocoa preparations, especially of cocoa powder and cocoa butter. Exports of cocoa powder (without sugar) have fallen slightly in

comparison with 1913, although they showed a recovery in 1928. As regards other products, there has been a substantial gain in comparison with the year before the war. Figures for 1913 and the five years 1925 to 1929 are shown in Table LXIII below.

TABLE LXIII.—*Exports of Cocoa Preparations from the Netherlands.*

Description.	1913.	1925.	1926.	1927.	1928.	1929.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Cocoa powder (without sugar).	17,450	14,360	13,650	13,490	15,130	14,290
Chocolate (with sugar) ..	1,200	5,010	5,050	4,960	4,740	5,420
Cocoa bars or blocks (without sugar).	30	240	240	360	270	350
Cocoa butter	7,050	12,270	13,460	12,420	13,500	15,130

179. In each of the above products there is an appreciable but declining import trade. Figures for recent years are shown in the following table :—

TABLE LXIV.—*Imports of Cocoa Preparations into the Netherlands.*

Description.	1925.	1926.	1927.	1928.	1929.
	Tons.	Tons.	Tons.	Tons.	Tons.
Cocoa powder	486	610	324	124	93
Chocolate	911	684	655	565	504
Cocoa bars and blocks ..	13	17	398	52	2
Cocoa butter	153	297	772	592	549

The United Kingdom is the main source of the cocoa powder and blocks, Belgium of the chocolate and Germany of the cocoa butter.

180. In view of Holland's place as the world's largest exporter of cocoa products (mainly cocoa powder and butter) it may be of interest to show the distribution of its export trade in 1913 and 1928.

(39884)

TABLE LXV.—*Exports of Cocoa Preparations from Holland.*

Exported to	Cocoa Powder.		Chocolate sweetened.		Cocoa Butter.	
	1913.	1928.	1913.	1928.	1913.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Great Britain and Ireland	9,450	1,090	230	2,360	860	2,910
Belgium	2,910	320	430	40	1,280	1,870
Germany	1,790	120	50	60	1,640	60
United States	770	2,690	30	580	1,510	10
Russia	560	—	(*b*)	(*b*)	840	40
Denmark	420	560	60	320	100	180
Italy	270	640	(*b*)	(*b*)	390	270
Dutch East Indies ..	210	420	150	550	(*b*)	(*b*)
Austria-Hungary ..	300	(*a*) 80	(*b*)	(*b*)	20	(*a*) 290
Sweden	170	190	(*b*)	(*b*)	20	240
France	90	5,170	—	80	10	990
Poland	—	880	—	(*b*)	—	860
Switzerland	(*b*)	240	(*b*)	(*b*)	(*b*)	1,610
Other countries	510	2,730	250	750	380	4,170
Total	17,450	15,130	1,200	4,740	7,050	13,500

(*a*) Austria. (*b*) Included, if any, in " other countries."

181. Great Britain and Belgium are the chief buyers of Dutch cocoa butter, Germany and the United States having fallen from the leading positions which they occupied in 1913. Switzerland and France have also assumed prominence, together with Poland, and among countries not shown separately above, New Zealand (710 tons in 1928), Australia (440 tons), Czechoslovakia (390 tons) and Canada (1,250 tons). As regards cocoa powder, France and the United States have replaced the United Kingdom and Belgium. Exports of sweetened chocolate, in powder or blocks and bars are not very large, but are a good deal heavier than before the war. The United Kingdom and the United States of America (each with a very substantial manufacturing industry of its own) are the largest purchasers. Exports of other sorts of cocoa preparations are small, amounting in 1928 to only 270 tons.

France.

182. Although imports of cocoa for home consumption into France in each of the years 1924 to 1926 were much heavier than the average for the years 1909–13, there was a heavy fall in 1927, almost to the pre-war level, followed by only a partial recovery in 1928 and 1929, as is shown in the following table :—

TABLE LXVI.—*Imports of Raw Cocoa into France for Home Consumption.*

	Year.	*Tons.*
Average	1909–13	25,640
	1924	42,210
	1925	42,960
	1926	40,500
	1927	27,620
	1928	33,550
	1929	35,180

This falling off in imports is partly attributed to the currency situation, but according to some authorities is mainly due to the accumulation of large invisible stocks during 1926.

183. With the exception of the United Kingdom, France is the only important cocoa consuming country with large areas suitable for cocoa cultivation within its own colonies, and a glance at Table LXVII will show the rapid increase in imports from the French Colonial possessions, which supplied only 1,900 tons in 1913. Each year since 1924 has shown a steady increase and in 1928 the quantity obtained therefrom amounted to 26,000 tons, including 6,900 tons from French Cameroon, and 5,900 tons from French Togoland.

184. Although consumption has fallen off in recent years, the imports from the Ivory Coast have steadily increased and with the development of this country there is little doubt that this rate of increase will continue. Little or no supplies of cocoa have been received in recent years from the Dominican Republic, formerly an important source, and the quantity received from Venezuela, once the largest exporter to France, dropped to 2,160 tons in 1928.

185. France is not a very large importer of cocoa from the British Empire, as the following table will show. Imports are practically limited to those from British West Africa, from which the quantity obtained has heavily declined in recent years, and the West Indies, which sends some 3,000 tons each year. In the case of both these countries

the imports were in 1928 less than half the 1913 totals. On the average about 15 per cent. of the raw cocoa is exported, mainly to Switzerland, Holland, Belgium, Italy and other European countries.

TABLE LXVII.—*Imports of Raw Cocoa into France.*

Imported from.	1913.	1924.	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Foreign countries—						
Portugal	1,930	240	460	(*a*)	(*a*)	(*b*)
West Africa	410	1,460	600	1,700	590	600
British West Africa ..	8,310	12,890	14,830	14,480	3,710	3,640
Venezuela	10,060	4,570	4,680	3,620	2,270	2,160
Brazil	5,440	7,220	5,550	3,860	2,350	3,220
Ecuador	7,720	3,530	3,440	2,180	400	780
British West Indies ..	7,900	3,760	3,340	2,700	2,610	3,130
Haiti	1,260	650	360	1,190	(*a*)	(*b*)
Dominican Republic ..	5,040	20	(*a*)	(*a*)	(*a*)	(*b*)
Togo*	—	4,690	4,120	3,670	3,640	5,910
Cameroon*	—	3,210	3,550	4,390	3,870	6,900
Other foreign countries	4,880	3,790	3,850	2,170	1,150	(*b*)
Total foreign countries	52,950	46,030	44,780	39,960	20,590	(*b*)
Colonies—						
French Congo	120	250	110	260	(*a*)	(*b*)
French Oceania ..	—	280	590	380	(*a*)	(*b*)
West Africa	70	4,090	4,750	5,550	7,660	11,440
West Indies	1,570	1,050	950	960	1,370	890
Other French colonies..	110	230	270	150	670	(*b*)
Total French colonies..	1,870	5,900	6,670	7,300	9,700	(*b*)
Total	54,820	51,930	51,450	47,260	30,290	41,940

* French mandates. (*a*) Included, if any, in other countries. (*b*) Not available.

186. The French export trade in cocoa butter is negligible. There is a small export of cocoa paste, amounting to 115 tons in 1928 and 129 tons in 1929, mainly to Italy and Holland, while there is an important export of finished chocolate, although the trade (still larger than before the war) appears to be declining. Exports of chocolate in 1913 amounted to 2,100 tons, in 1924 to 8,200 tons, and in 1929 to 4,390 tons. The greater part of the exports of chocolate

go to French possessions, principally Algeria, while Germany, Egypt and Syria also account for fair quantities. Exports of cocoa preparations from France in 1913 and in recent years are given below.

TABLE LXVIII.—*Exports of Cocoa Preparations from France.*

Description.	1913.	1924.	1925.	1926.	1927.	1928.
	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.	000 cwts.
Cocoa paste ..	0·6	1·8	1·8	2·7	4·7	2·3
Chocolate	41·9	164·6	105·3	109·8	73·0	75·1

187. France imports considerable quantities of cocoa preparations, but the greater part of these consist of cocoa powder imported from the Netherlands. Imports in 1928 and 1929, respectively, amounted to 4,320 and 4,360 tons of crushed cocoa, 1,180 and 1,190 tons of cocoa butter, and 750 and 660 tons of chocolate. Crushed cocoa is described as "paste or otherwise," and Dutch export returns, and the low average value of the imports, suggest that it consists very largely of waste cocoa products.

Spain.

188. Consumption of cocoa in Spain steadily increased from 1912 to 1924, when the peak was reached with imports of 13,300 tons. The following years registered a decrease, but in 1928 the total amounted to 11,650 tons which is a record figure except for that of the year 1924 as is shown in the following table of imports into Spain for the years 1911 to 1928.

TABLE LXIX.—*Imports of Raw Cocoa into Spain.*

Year.	Tons.	Year.	Tons.
1911	6,340	1920	8,480
1912	5,240	1921	7,910
1913	6,140	1922	8,840
1914	6,840	1923	10,100
1915	6,670	1924	13,330
1916	7,420	1925	9,480
1917	7,900	1926	7,950
1918	8,930	1927	9,150
1919	8,040	1928	11,650

189. Spain absorbs practically the total output of its colony Fernando Po, which is its principal source of supply, and contributes

about two-thirds of the total imports. The remainder is comprised chiefly of supplies from the South American states, and from British countries in Africa. The imports of cocoa into Spain with details of countries of consignment for the four years ended 1928 are given below :—

TABLE LXX.—*Imports of Raw Cocoa into Spain.*

Imported from	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.
Fernando Po	5,870	5,660	5,870	8,420
Venezuela	1,000	1,160	1,320	1,050
Ecuador	930	700	910	940
British Africa	610	30	440	370
Brazil	30	250	340	500
British West Indies	80	50	180	240
Cuba	—	20	20	—
Porto Rico	30	30	20	10
India and Ceylon	570	20	10	30
Other countries	360	30	40	90
Total	9,480	7,950	9,150	11,650

Italy.

190. As compared with the average imports immediately before the war, Italy had more than quadrupled her imports in 1928, as may be seen in the following table :—

TABLE LXXI.—*Imports of Raw Cocoa into Italy.*

	Year.	*Tons.*
Average	1909–13	2,080
	1923	5,320
	1924	6,370
	1925	7,920
	1926	7,450
	1927	6,360
	1928	8,400

191. The average imports for the period 1923–27 amounted to 6,680 tons compared with 2,080 tons for the quinquennium 1909–13 ; from 1925 there was a decrease in the amount of cocoa imported, but the year 1928 witnessed a recovery to the highest point yet

reached. The main supplies come from Portuguese Africa, British Africa and Brazil. The imports from the various consigning countries in each of the years 1925 to 1928 are given below :—

TABLE LXXII.—*Imports of Raw Cocoa into Italy.*

Imported from	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.
Portuguese Africa	2,180	2,030	1,950	1,570
Brazil	1,910	2,110	1,680	2,210
British Africa	1,530	1,320	1,670	2,920
Ecuador	290	400	370	600
British West Indies	580	340	260	460
Venezuela	520	670	220	170
India	70	60	100	30
Dutch Indies	210	100	70	140
Other countries	630	420	40	300
Total	7,920	7,450	6,360	8,400

Czechoslovakia.

192. Imports of cocoa into Czechoslovakia declined from 7,500 tons in 1925 and 1926 to 6,600 tons in 1927, and 6,800 tons in 1928, but rose to 8,050 tons in 1929. As will be seen from the following table of imports for the years 1925 to 1928, most of the cocoa is imported through the free port of Hamburg, and therefore it is impossible to give the original sources of supply except for minor quantities.

TABLE LXXIII.—*Imports of Raw Cocoa into Czechoslovakia.*

Imported from	1925.	1926.	1927.	1928.
	Tons.	Tons.	Tons.	Tons.
Hamburg	3,350	6,710	5,890	6,040
Germany	2,820	90	20	—
Netherlands	550	170	300	130
British West Africa	100	160	140	450
Italy (including Trieste)	80	50	30	30
Brazil	110	60	30	60
Other South American Republics ..	20	20	40	10
United Kingdom	280	100	30	10
India	20	30	10	30
Other countries	200	90	70	80
Total	7,530	7,480	6,560	6,840

Switzerland.

193. Switzerland is the most important of the three European countries importing less cocoa than before the War, the other two being Belgium and Finland. The imports for recent years as compared with the average for the years 1909–13 are shown below :—

TABLE LXXIV.—*Imports of Raw Cocoa into Switzerland.*

	Year.	Tons.
Average	1909–13	9,100
	1924	8,090
	1925	6,760
	1926	6,600
	1927	7,420
	1928	8,650
	1929	8,470

194. From the foregoing table it will be seen that during 1925 and 1926 there was a considerable drop in imports compared with the pre-war average, and although the figures for subsequent years showed a considerable improvement, they were still below the pre-war quantities. The distribution of imports by countries in the four years 1925 to 1928 is given in the following table :—

TABLE LXXV.—*Imports of Raw Cocoa into Switzerland.*

Country of Origin.	1925. Tons.	1926. Tons.	1927. Tons.	1928. Tons.
West Africa	—	3,860	4,080	5,450
Brazil	1,060	860	1,120	1,160
Venezuela	940	830	760	820
British West Indies	460	300	580	650
Ecuador	880	650	800	500
Central America	80	70	60	50
Dutch Indies	40	30	20	10
Congo	3,270	—	—	—
Other countries	30	—	—	10
Total	6,760	6,600	7,420	8,650

195. The above table shows that supplies from West Africa and Brazil have been steadily increasing during recent years, these countries supplying 76 per cent. of the total imports during 1928, West Africa alone supplying 63 per cent. of the total imports.

196. Before the war Switzerland was easily the largest exporter of manufactured chocolate in the world and although its supremacy is now being threatened, it still leads by an appreciable margin. The reduction in exports of chocolate is fairly well distributed with the exception that the United Kingdom is now taking larger quantities than before the war and accounts for well over one-half total exports of Swiss chocolate. Exports of cocoa butter are and have always been negligible and exports of cocoa powder are small. (Switzerland is a substantial importer of cocoa butter and cocoa powder from Holland.) The distribution of exports of chocolate from Switzerland in 1913 and in the five years 1924 to 1928 are shown in the following table. Exports in 1929 declined sharply to 7,280 tons.

TABLE LXXVI.—*Exports of Chocolate from Switzerland.*

Destination.	1913. Tons.	1924. Tons.	1925. Tons.	1926. Tons.	1927. Tons.	1928. Tons.
United Kingdom	4,420	4,760	5,970	5,170	4,970	4,880
Germany	1,730	1,120	170	190	630	650
United States	150	160	300	300	230	550
Italy	2,190	230	250	170	220	280
Denmark	190	240	270	290	270	230
China	20	100	70	120	140	180
South Africa	120	120	140	160	180	180
Turkey	590	50	110	90	170	160
France	1,150	140	270	90	70	140
Yugo Slavia	—	40	60	100	190	140
Egypt	110	60	110	100	90	120
India	70	50	70	100	110	120
Australia	1,360	60	70	80	70	40
Russia	780	(*a*)	(*b*)	(*b*)	(*b*)	(*b*)
Belgium	480	40	80	10	(*a*)	10
Other countries	2,300	640	770	610	680	830
Total	15,660	7,810	8,710	7,580	8,020	8,510

(*a*) Less than 5 tons.
(*b*) Included, if any, in " Other countries."

Belgium and Luxemburg.

197. Imports of cocoa into Belgium in recent years have been considerably below the pre-war figure, and although increasing

during the past few years, amounted in 1929 to only 8,200 tons as compared with 11,400 tons in the year 1913. The imports for the years 1924 to 1929 as compared with 1913 are given below :—

TABLE LXXVII.—*Imports of Raw Cocoa into Belgium.*

Year.	*Tons.*
1913	11,440
1924	8,370
1925	7,670
1926	7,710
1927	5,730
1928	6,460
1929	8,160

198. In the following table are shown the principal sources of supply in 1927, 1928 and 1929. So great a proportion of the raw cocoa is obtained from Holland and other continental countries that little information can be gained as to the original sources of the cocoa imported.

TABLE LXXVIII.—*Imports for Consumption of Raw Cocoa into Belgium.*

Imported from	1927. Tons.	1928. Tons.	1929. Tons.
Belgian Congo	810	630	1,120
Brazil	470	680	690
France	850	800	1,370
Hamburg	250	320	280
Netherlands	2,010	2,890	2,700
Other countries	1,340	1,140	2,000
Total	5,730	6,460	8,160

199. Belgium has a moderate export trade in chocolate, and this trade is considerably larger than before the war, but during the five years 1924 to 1928 declined by about 60 per cent., and 1929 figures show a further decline to 1,230 tons. Distribution of exports of chocolate in 1913 and recent years is shown in the following table. Exports of other cocoa preparations are unimportant.

TABLE LXXIX.—*Exports of Chocolate from Belgium.*

Country to which Consigned.	1913. Tons.	1924. Tons.	1925. Tons.	1926. Tons.	1927. Tons.	1928. Tons.
United Kingdom	10	160	350	760	840	430
Denmark	(*a*)	130	30	190	160	230
Netherlands	20	520	620	520	330	170
Egypt	(*a*)	270	290	290	110	100
France	20	680	330	100	80	60
Germany	(*a*)	1,190	530	120	140	50
Other countries	250	520	630	590	410	360
Total	300	3,470	2,780	2,570	2,070	1,400

(*a*) Included in other countries.

Sweden.

200. Sweden is now the principal market for cocoa among the Scandinavian countries, although prior to the War this position was held by Denmark. Imports have declined from 4,300 tons in 1924 to 3,800 tons in 1929, but this quantity is still more than double the average for 1909–13. The following table gives the imports in recent years :—

TABLE LXXX.—*Imports of Raw Cocoa into Sweden.*

	Year.	*Tons.*
Average	1909–13	1,350
	1924	4,320
	1925	3,630
	1926	3,580
	1927	3,310
	1928	3,470
	1929	3,770

201. Most of the supplies of cocoa come through Germany, the United Kingdom, Denmark and Holland, and details of quantities according to countries of origin are not available. Brazil is the only cocoa growing country whence cocoa is consigned to Sweden, with a total of about 500 tons annually, but the fact that Germany and the United Kingdom are shown as supplying over 50 per cent. of imports of raw cocoa suggests that a considerable proportion of total imports originates in British West Africa.

202. Sweden's imports of cocoa powder and chocolate, which amounted to 200 and 85 tons respectively in 1913, totalled in 1927 about 270 and 190 tons and in 1928 about 230 and 230 tons respectively. The bulk of the powder comes from Holland and the United Kingdom, and of the chocolate from Switzerland, followed by Holland, Germany and Belgium.

Norway.

203. Norway is not an important market for raw cocoa, although consumption has considerably increased since the War. The imports for the years 1924 to 1929 and the average for 1909 to 1913 are shown below :—

TABLE LXXXI.—*Imports of Raw Cocoa into Norway.*

Year.	*Tons.*
Average 1909–13	980
1924	2,360
1925	2,070
1926	2,310
1927	2,040
1928	2,150
1929	2,100

204. It will be noticed from the foregoing table that imports have remained more or less at the same level in recent years. West Africa appears to be the chief source of supply, although almost equally large quantities come from Germany and Brazil, as may be seen in the following table of imports in the year 1927 and 1928 :—

TABLE LXXXII.—*Imports of Raw Cocoa and Cocoa Butter* (*a*) *into Norway.*

Imported from—	1927. *Tons.*	1928. *Tons.*
West Africa	710	910
Germany	540	460
Brazil	440	430
United Kingdom	190	200
Holland	160	100
Belgium	20	} 80
Other countries	20	
Total	2,080	2,180

(*a*) The imports of cocoa butter in 1927 amounted to 36 tons and in 1928 to 29 tons.

Denmark.

205. Imports of raw cocoa into Denmark have shown a fairly steady increase in recent years and are rather above the 1913 figure. Imports in the pre-war five years period averaged about 1,700 tons annually, while in the last five years they have averaged about 2,500 tons, with a rising tendency. South America and Germany are the chief sources of supply, as may be seen in the following table of imports from the principal countries of consignment :—

TABLE LXXXIII.—*Imports of Raw Cocoa into Denmark.*

Imported from	1913. Tons.	1926. Tons.	1927. Tons.	1928. Tons.
Germany	980	520	550	510
Great Britain	80	140	380	470
Holland	—	200	270	170
France	60	30	180	90
Portugal	50	70	30	80
West Indies	80	—	30	40
Brazil	640	1,190	880	1,000
Other South American countries	70	170	320	350
Other countries	70	40	60	70
Total	2,030	2,360	2,700	2,780

206. Denmark is a fairly important market for cocoa preparations, principally chocolate, from Germany, Switzerland, Holland and Belgium. Imports of cocoa preparations into Denmark are shown below.

TABLE LXXXIV.—*Imports of Cocoa Preparations into Denmark.*

Description.	1913. 000 cwts.	1926. 000 cwts.	1927. 000 cwts.	1928. 000 cwts.
Cocoa powder	5·8	8·2	8·2	8·1
Chocolate (*a*)	7·0	25·9	25·9	25·7
Other products (*c*)	(*b*)	3·0	4·7	5·5
Cocoa butter	(*b*)	5·7	5·8	4·5

(*a*) Including household chocolate and chocolate coating.
(*b*) Not available. (*c*) Cocoa paste and cocoa husks.

Poland.

207. In relation to its population of slightly over 30 millions, the consumption of raw cocoa in Poland is very small, as the following figures of imports for the years 1924 to 1928 show :—

TABLE LXXXV.—*Imports of Raw Cocoa into Poland.*

Year.	*Tons.*
1924	4,370
1925	3,710
1926	3,040
1927	4,320
1928	4,830

Supplies are mostly received through other European countries, principally Holland, which is shown as the country of consignment of 70 per cent. of the imports, other countries specified being France, the United Kingdom, Germany, Brazil and British West Africa.

208. Poland also imports considerable quantities of cocoa butter, mainly from Holland, and the chocolate manufacturing industry appears to be developing. Imports of cocoa preparations are not large, amounting only to about one half-ounce per head per annum.

Austria.

209. Although the consumption of cocoa in Austria fell to a very low level after the War, it now appears to be recovering. During each of the three years 1925 to 1927 imports were stable at 4,700 tons and in 1928 rose to 5,300 tons. The most important sources of supply are Brazil, British Africa and Holland. British West Africa is now receiving a considerable amount of the business which formerly went to Brazil, and in the years 1927 and 1928 was the main source of supply. The details of the countries of consignment in the years 1925 to 1928 are as follows :—

TABLE LXXXVI.—*Imports of Raw Cocoa into Austria.*

Imported from	1925. Tons.	1926. Tons.	1927. Tons.	1928. Tons.
Germany	40	240	310	80
Switzerland	340	310	420	540
German free ports	200	80	180	—
Holland	640	980	930	990
British Africa	570	920	1,230	1,420
Brazil	2,110	1,820	1,190	1,170
British West Indies	80	40	70	440
Other countries	720	310	370	650
Total	4,700	4,700	4,700	5,290

Rumania.

210. Imports of cocoa into Rumania have remained more or less stationary during recent years at about 800 tons, as compared with an average of 290 tons for the years 1909–13. Imports for the years 1924 to 1927, and the average for 1909–13 were as follows :—

TABLE LXXXVII.—*Imports of Raw Cocoa into Rumania.*

	Year.	*Tons.*
Average	1909–13	290
	1924	790
	1925	800
	1926	800
	1927	790

Practically the whole of the cocoa imported is shown as coming from other European countries, and it is not possible to indicate the country of origin. France, Germany and the United Kingdom, in the order named, are the chief countries of supply.

Portugal.

211. Although Portugal imports large quantities of cocoa from her colony San Thomé and Principe, only a small amount is retained

for home consumption. The quantities entered for home consumption from sources other than San Thomé are insignificant. The retained imports in 1913, and in 1924–27 were as follows :—

TABLE LXXXVIII.—*Imports of Raw Cocoa for Home Consumption into Portugual.*

Year.	*Tons.*
1913	220
1924	370
1925	440
1926	670
1927	430

Jugo-Slavia.

212. Although at present only of minor importance as a cocoa market, consumption has increased considerably in Jugo-Slavia. Most of the cocoa imported comes from other European countries. The imports for the years 1924 to 1929 were as follows :—

TABLE LXXXIX.—*Imports of Raw Cocoa into the Serb-Croat-Slovene State.*

Year.	*Tons.*
1924	290
1925	390
1926	450
1927	530
1928	650
1929	850

Russia.

213. Although imports of cocoa into Russia are still below the pre-war figure, they have been increasing during recent years. The following table shows the imports from 1924 to 1927. For purposes of approximate comparison the average for 1911–13 is also given, but owing to territorial changes the figures are not strictly comparable.

TABLE XC.—*Imports of Raw Cocoa into Russia.*

	Year.	*Tons.*
Average	1911–13..	4,510
	1924	1,910
	1925	3,560
	1926	1,980
	1927	3,650

214. Until the past two or three years, imports consisted mainly of cocoa re-exported from other European countries, chiefly the Netherlands and the United Kingdom, but in 1926–27 and the following year, imports from both the United Kingdom and Holland fell to small dimensions and Germany and " Other countries " have bulked much more prominently in the total. In the following table are shown the imports by countries in recent years.

TABLE XCI.—*Imports of Raw Cocoa into Russia. European frontier only.*

Imported from	1925–26. Tons.	1926–27. Tons.	1927–28. Tons.
Netherlands	1,220	580	180
U.S.A.	130	440	490
United Kingdom	1,110	120	70
Germany	—	90	890
Turkey	—	20	210
Other countries	340	1,510	2,730
Total	2,800	2,760	4,570

Argentina.

215. Imports of cocoa into the Argentine Republic have shown an increasing tendency, and figures for 1927 were exceptionally heavy. The imports in the years 1924 to 1928 are given below :—

TABLE XCII.—*Imports of Raw Cocoa into Argentina.*

	Year.	*Tons.*
Average	1909–13..	1,160
	1924	3,000
	1925	3,800
	1926	3,520
	1927	4,640
	1928	4,540

216. The bulk of the cocoa is imported from Brazil, only minor quantities being imported from Ecuador, Venezuela and other countries. The details are shown in the following table of the imports by countries in the years 1924 to 1927.

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TABLE XCIII.—*Imports of Raw Cocoa into Argentina.*

Imported from	1924.	1925.	1926.	1927.
	Tons.	Tons.	Tons.	Tons.
Brazil	2,630	3,000	3,050	3,890
Cuba	—	300	160	50
Ecuador	—	110	100	220
Venezuela	50	40	70	160
United Kingdom	40	100	40	(*a*)
British Possessions	50	60	20	(*a*)
U.S.A.	90	70	20	(*a*)
Chile	60	30	20	(*a*)
British West Indies	40	—	—	(*a*)
Other countries	40	90	40	320
Total	3,000	3,800	3,520	4,640

(*a*) Included in " Other countries."

Philippines.

217. The bulk of the cocoa imported into the Philippines comes from Ceylon, but small quantities are also received from the Dutch East Indies. The imports for the years 1926 and 1927 were as follows :

TABLE XCIV.—*Imports of Raw Cocoa into the Philippines.*

Imported from	1926.	1927.
	Tons.	Tons.
British East Indies	1,330	1,190
Dutch East Indies	210	160
Germany	40	—
U.S.A.	40	—
Total	1,620	1,350

218. Cocoa is also grown in the Philippines, although not in sufficient quantities to meet home requirements. Production in recent years is shown in the following table :—

TABLE XCV.—*Production of Cocoa in the Philippines.*

Calendar Years.	*Tons.*
1924	1,140
1925	1,090
1926	1,070
1927	1,070
1928	1,150

Production could be considerably increased if it were not for the violent storms which frequently arise in this locality.

CONCLUSION AND SUMMARY.

219. The past thirty years have wrought enormous changes in the relative importance of the various cocoa growing countries, and former leaders in production, such as Ecuador, San Thomé and Trinidad have now been eclipsed by the Gold Coast, Brazil and Nigeria, owing to the extremely rapid development of the industry in the latter countries. In the five years immediately preceding the war, four countries—Ecuador, San Thomé, the Gold Coast and Brazil—competed for first place among the world's cocoa producers, each having an average export of over 30,000 tons per annum, although by the end of the quinquennium the Gold Coast had gone well ahead with an export of over 50,000 tons in 1913.

220. In the post-war years the Gold Coast has gone still further ahead, and in the past five years has regularly furnished between 40 and 50 per cent. of the world's cocoa exports. Brazil, although development has been rapid, exports only about one-third of the quantity shipped from the Gold Coast.

221. Following the example of the Gold Coast, Nigeria and the neighbouring colonies of French West Africa are doing their utmost to increase their output. Nigeria is approaching the stage reached by the Gold Coast just before the war, and the French possessions in West Africa are within measurable distance of Nigerian production, and appear to be developing at a more rapid rate. The very rapid development of cocoa production in French West and Equatorial Africa suggests that these French colonies may before long challenge Brazil and Nigeria for second place among the cocoa producing countries of the world.

222. All these countries produce cocoa of ordinary quality, and it is noticeable that only San Thomé among the important producers of ordinary cocoa has failed to show a substantial advance in production in comparison with pre-war years. Annual exports of ordinary cocoa from all producing countries have in recent years exceeded 400,000 tons, or fully three times the pre-war average. On the other hand, production of the "fine" types of cocoa is definitely declining, and combined exports from all countries producing these finer sorts, which for some years after the war were in excess of the pre-war average, have since fallen until in 1926 and 1927 they were about 10 per cent. below the average exports for the five years 1909–13.

(39884) F*

223. The following table shows the net exports of these two groups by calendar years, and although these figures cannot be taken as a sure guide to production, for the reason that the main harvesting season in most countries runs from the latter part of one calendar year into the early part of the next, they clearly show the diminishing output of the first group and the increasing output of the second.

TABLE XCVI.—*Net Exports of Raw Cocoa from Countries producing "Fine" and "Ordinary" sorts.*

—	1909–13.	1922.	1923.	1924.	1925.	1926.	1927.
	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Fine Cocoa.							
Venezuela ..	15,800	20,560	22,070	17,050	22,580	14,810	15,160
Ecuador ..	36,760	43,550	30,390	32,720	32,380	21,430	23,200
Trinidad	22,540	22,880	30,320	25,080	21,840	22,000	23,030
Grenada	5,330	3,640	3,890	4,270	3,660	4,170	5,020
Ceylon	3,540	4,160	3,040	3,470	3,440	3,240	4,040
Dutch East Indies	2,310	1,240	1,300	1,600	1,180	1,080	960
Jamaica ..	2,600	3,840	2,160	2,960	2,620	3,010	2,860
Costa Rica ..	280	2,060	4,190	3,620	4,080	5,230	3,370
Dutch Guiana ..	1,580	1,540	1,390	730	800	130	210
Other countries ..	4,560	6,380	4,280	6,070	5,990	7,240	7,150
Total ..	95,300	109,850	103,030	97,570	98,570	82,340	85,000
Ordinary Cocoa.							
Gold Coast ..	34,350	159,300	197,660	223,330	218,150	230,840	209,910
Brazil	31,140	44,560	64,300	67,780	63,510	62,310	74,350
Nigeria	3,320	31,260	32,820	37,200	41,070	36,000	36,090
San Thomé ..	34,080	20,350	12,710	21,630	20,530	12,270	16,500
San Domingo ..	17,990	18,690	19,520	22,780	23,110	19,770	26,090
Haiti	2,440	1,970	1,990	1,620	1,510	2,160	1,600
French Equatorial and W. Africa.	4,170*	9,460	10,380	15,210	15,710	17,330	23,400
British Cameroons	—	3,210	1,640	3,170	3,640	3,100	3,120
Fernando Po ..	3,590	5,920	7,090	9,480	5,870	5,670	5,870
Other countries ..	1,750	4,510	5,180	6,560	6,930	6,900	7,080
Total ..	132,830	299,230	353,290	408,760	400,030	396,350	404,010
Grand Total ..	228,130	409,080	456,320	506,330	498,600	478,690	489,010

* Includes pre-war exports from territories now under British and French mandates.

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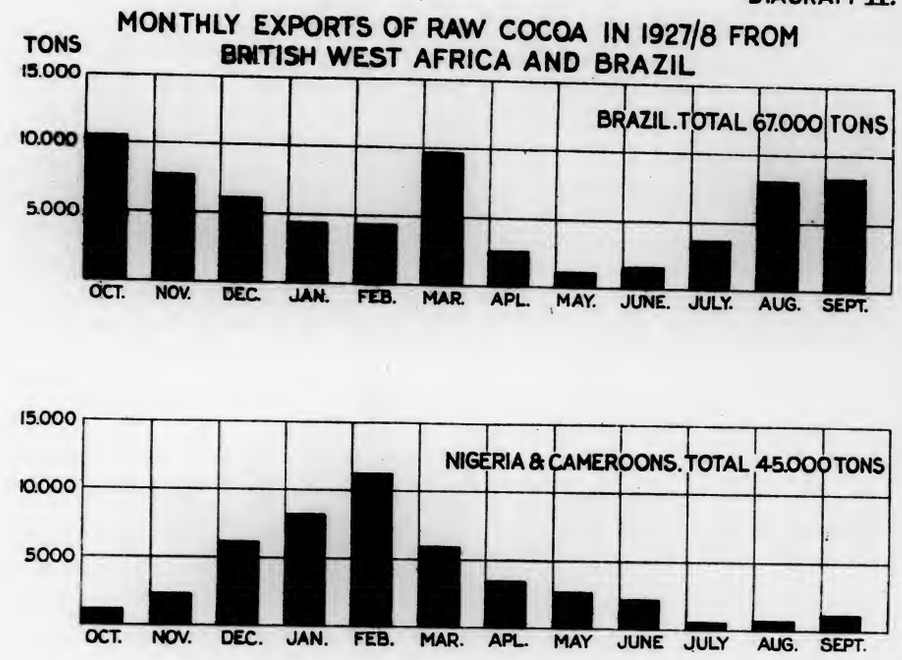
DIAGRAM II.


MONTHLY EXPORTS OF RAW COCOA IN 1927/8 FROM BRITISH WEST AFRICA AND BRAZIL
TONS
15.000
10.000
5.000
BRAZIL. TOTAL 67.000 TONS
OCT. NOV. DEC. JAN. FEB. MAR. APL. MAY. JUNE. JULY. AUG. SEPT.
15.000
10.000
5000
NIGERIA & CAMEROONS. TOTAL 45.000 TONS
OCT. NOV. DEC. JAN. FEB. MAR. APL. MAY JUNE JULY AUG. SEPT.
40.000
30.000
20.000
10.000
GOLD COAST. TOTAL 201.000 TONS
OCT. NOV. DEC. JAN. FEB. MAR. APL. MAY JUNE JULY. AUG. SEPT.

2161,

Malby & Sons

224. The predominant position of the Empire in the world's cocoa production is revealed by this table. The Gold Coast and Nigeria together accounted for over 60 per cent. of total exports of ordinary cocoa in 1927, as compared with a proportion of less than 30 per cent. in 1909–13. In the case of fine cocoa, Ceylon and the three West Indian islands shown in the table now account for about 40 per cent. of total exports as compared with about 35 per cent. before the war, although this increase is the result rather of the substantial decline in production in Ecuador than to any material increase in production in the Empire. Only Costa Rica among producers of fine cocoa has shown a marked increase in production, and exports from that source are not yet large although they bid fair to become more important as time goes on.

225. Altogether ordinary cocoa now accounts for 83 per cent. of all the raw cocoa entering into world trade, whereas in the five years from 1909 to 1913 the proportion of ordinary cocoa in the total was less than 60 per cent.

226. In many producing countries the main cocoa harvest overlaps the end of one calendar year and the beginning of the next, but there are usually one or more secondary harvests and cocoa is actually gathered almost throughout the year. The Gold Coast, furnishing little less than one-half the world's annual supply of raw cocoa, exports relatively little from June to October. In Diagram II are shown monthly exports of cocoa from the three chief producing countries in 1927–28.

227. The consumption of cocoa in consuming countries has of course kept pace more or less regularly with increasing world production. There have been fluctuations from year to year in the world output of raw cocoa, and these have been reflected in the prices ruling for the product. At times production appears to be outstripping demand and the result is a fall in prices, apparently out of all proportion to the surplus production of the period. But there are also occasions when a comparatively slight deficiency in crops is sufficient to bring about a very sharp increase in world prices.

228. Figures are not available for the actual consumption of cocoa in the various consuming countries, owing to the substantial export trade in manufactured cocoa products enjoyed by a number of them. An approximate idea of consumption can be gathered from the import figures, but in the case of Holland and Switzerland, to a smaller

extent in the United Kingdom, and to a still smaller extent in other countries, the export trade in cocoa preparations is important in relation to raw cocoa imports. In the following table are shown average imports of raw cocoa into the leading consuming countries in the world in the quinquennium before the war, and for periods of three years in post-war years.

TABLE XCVII.—*Average Net Imports of Raw Cocoa.*

—	1909–13.	1919–21.	1922–24.	1925–27.
	Tons.	Tons.	Tons.	Tons.
U.S.A.	58,400	139,600	163,300	177,500
Germany	47,700	72,800(*a*)	73,000	69,800
United Kingdom	26,900	57,900	48,700	54,700
Holland	24,600	30,100	36,000	43,100
France	25,500	43,700	39,200	37,100
Switzerland	9,100	11,600	5,500	6,900
Italy	2,100	4,900	5,600	7,200
Belgium	5,600	7,700	8,400	6,600
Spain	5,800	7,900	10,300	8,900
Czechoslovakia	—	2,700	6,300	7,200
Canada	1,900	7,000	7,600	6,600
Other countries	17,900	25,100	27,200	40,900
Total	225,500	411,000	431,100	466,500

(*a*) 1920–21.

229. Imports actually reached their peak in 1924 and declined during the three following years, but this cannot be taken as definite evidence of any actual decrease in consumption, as the variations in imports have not been greater than could be readily explained by fluctuating stocks.

230. In comparison with pre-war years, the United States, in the last period shown above, has increased its imports by 200 per cent., imports into the United Kingdom have doubled and the increases in imports into Germany, Holland and France have also been very heavy. Imports into the large number of countries not shown separately above have also more than doubled; the chief of these "other countries" are Austria, Argentina, Australia, Poland, Sweden, Colombia, Denmark, Norway, Hungary and the Philippines, which have an average annual importation of between 1,500 and 5,000 tons.

231. In general, as has been stated, the import figures may be taken as reflecting fairly truly the increase in consumption within the importing country. Actually international trade in cocoa products is considerably larger than before the war, but the increase is in most cases on a smaller scale than the increase in imports of the raw material. The Swiss export trade in chocolate has suffered considerably, and the trade of the United Kingdom in cocoa preparations in general is very little larger than before the war. It seems evident that the increasing supplies of raw cocoa are not only leading to larger consumption in the main manufacturing countries, but are also causing countries which previously imported manufactured products to develop manufactures for their own domestic requirements.

232. Exports of cocoa products and of cocoa butter from the leading countries, so far as it is possible to group them, are shown below for 1913, 1924 and 1928.

TABLE XCVIII.—*Exports of Cocoa Preparations from certain countries.*

Description.		U.K.	U.S.A.	Holland.	France.	Switzerland.	Belgium.	Germany.
		Tons.	Tons.	Tons.	Tons.	Tons.	Tons.	Tons.
Cocoa powder ..	1913	(*a*)	(*a*)	17,450	30	890	—	1,100
	1924	3,625(*c*)	1,875	17,300	90	190	50	100
	1928	4,650(*c*)	950	15,130	110	220	10	200
Chocolate	1913	(*a*)	(*a*)	1,230	2,100	15,660	300	2,080
	1924	1,225	675	4,450	8,230	7,810	3,470	1,030
	1928	1,225	400	5,010	3,760	8,510	1,400	3,010
Confectionery ..	1913	(*a*)	(*a*)	—	—	—	—	660(*e*)
	1924	2,900	(*a*)	—	—	—	—	410(*e*)
	1928	2,550	925	—	—	—	—	680(*e*)
Total cocoa preparations	1913	8,250(*d*)	(*a*)	18,680	2,130	16,550	300	3,840
	1924	5,430(*b*)	2,550	21,750	8,320	8,000	3,520	1,540
	1928	6,950(*b*)	2,275	20,140	3,870	8,730	1,410	3,890
Cocoa butter	1913	(*a*)	(*a*)	7,050	4	20	30	1,980
	1924	1,420	375	11,700	30	2	20	5,250
	1928	775	1,075	13,500	4	6	40	1,360

(*a*) Not available.
(*b*) Excluding exports to Irish Free State.
(*c*) Cocoa preparations, unsweetened.
(*d*) Includes cocoa butter.
(*e*) Goods made from cocoa, chocolate, etc.

233. It has already been remarked that prices of raw cocoa have fluctuated extensively in recent years. Trinidad cocoa, for example, which was quoted at under 55*s*. per cwt. in June and July in 1924,

had advanced to over 80*s.* by the end of the year, fell to 60*s.* early in 1926, but by the end of that year had again passed 80*s.* per cwt. It reached 90*s.* in March, 1927, but by the end of 1928 had again fallen to below 60*s.* It recovered slightly in the year 1929 until it was quoted in December at 62*s.* to 65*s.* per cwt. Gold Coast cocoa has fluctuated somewhat similarly, but the decline continued throughout 1929, and December prices were only about 45*s.* per cwt., or about the average level in 1925. Prices in London for Trinidad and Accra cocoa are shown in Table XCIX from 1924 onwards. The quotations are shown graphically in Diagram III.

234. But although the price movements of Gold Coast and Trinidad cocoas have been on similar lines, there has been a significant narrowing of the margin between the two kinds, which may be taken as typifying respectively "ordinary" and "fine" cocoa, although there are a number of cocoas such as the best products of Ceylon, Ecuador and Western Samoa, which secure very much higher prices than Trinidad cocoa. In 1924 and 1925 Accra cocoa was realising only about 60 per cent. of the price of Trinidad fine cocoa; in 1926, the "ordinary" cocoa was valued at 76 per cent. of the "fine"; while in 1927 and 1928 the premium paid for Trinidad was even smaller, quotations for Gold Coast being 87 and 86 per cent. respectively of those for Trinidad. The gap tended to widen again during 1929, but Gold Coast cocoa, even at the time of the greatest difference during the year was still priced at over 70 per cent. of the Trinidad product.

235. So far the success of cocoa growing in West Africa has been due not only to suitability of soil and climate, but to the fact that it has flourished without any regular cultural attention. This appeals strongly to the natives, who have always been used to working in a desultory fashion. The native West African is able to establish his cocoa with hardly any capital expenditure, as he is able to subsist, until the cocoa trees begin to bear, on the native crops which are interplanted with the trees.

236. The planter in the more highly civilized countries of South America and the West Indies, finds some difficulty in meeting the competition of cocoa produced under the foregoing conditions.

237. It would appear that the striking development of cocoa growing in West Africa has only failed to render entirely unremunerative the production of this crop in the West Indies owing to

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DIAGRAM III.

MONTHLY AVERAGE PRICE OF GOLD COAST & TRINIDAD COCOA IN LONDON, 1924-1928

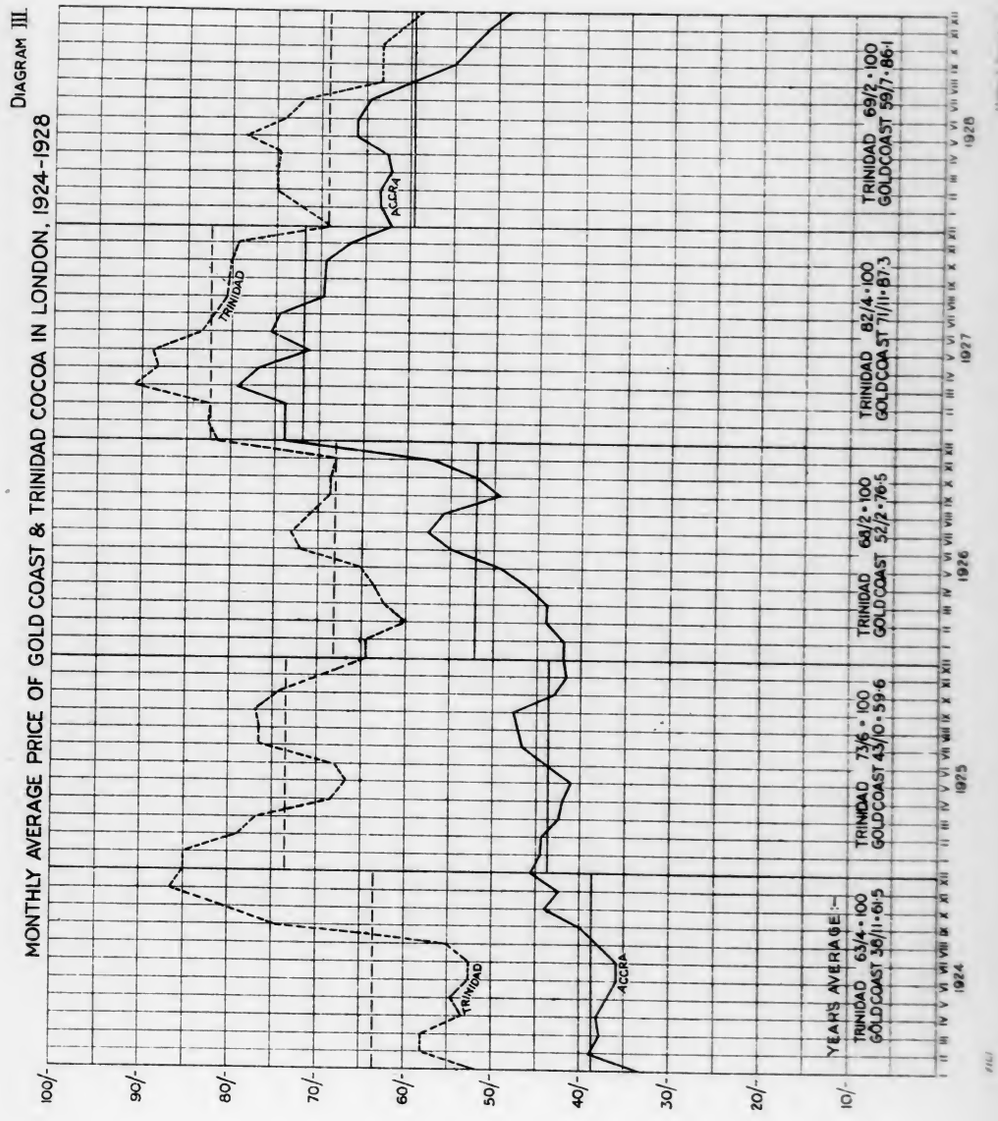

TABLE XCIX.—*Cocoa Prices in London per cwt.*

Month.	1924.				1925.				1926.				1927.				1928.			
	Accra.		Trinidad.		Accra.		Trinidad.		Accra.		Trinidad.		Accra.		Trinidad.		Accra.		Trinidad.	
January ..	32/–	34/–	51/–	52/–	44/–	45/–	84/–	86/–	41/6	42/6	64/–	65/–	72/–	76/–	82/–	83/–	62/–	65/–	72/–	73/–
February ..	38/–	40/–	57/–	59/–	44/–	45/–	78/–	80/–	43/–	45/–	59/–	61/–	72/–	76/–	82/–	83/–	62/–	65/–	74/–	76/–
March ..	37/–	39/–	57/–	59/–	42/–	43/–	76/–	78/–	43/–	45/–	62/–	63/–	77/–	82/–	90/–	92/–	61/–	63/–	74/–	76/–
April ..	37/6	39/–	53/–	54/–	41/–	43/–	68/–	69/–	45/–	47/–	63/–	64/–	75/–	79/–	88/–	89/–	61/–	64/6	73/–	76/–
May ..	36/–	38/–	54/–	55/–	40/–	42/–	66/–	67/–	48/–	50/–	64/–	66/–	70/–	73/–	88/–	90/–	64/–	68/–	77/–	80/–
June ..	35/–	37/–	52/–	53/–	43/–	44/–	67/–	69/–	54/–	56/–	71/–	73/–	73/–	78/–	83/–	84/–	64/–	68/–	73/–	75/–
July ..	35/–	37/–	52/–	53/–	45/–	48/–	76/–	77/–	56/–	59/–	72/–	74/–	72/–	77/–	81/–	83/–	62/–	67/–	71/–	73/–
August ..	36/–	39/–	54/–	56/–	46/–	48/–	76/–	77/–	54/–	58/–	70/–	72/–	67/–	72/–	80/–	81/–	58/–	61/–	62/–	65/–
September ..	39/–	41/–	73/–	75/–	47/–	48/–		77/–	48/–	51/–	68/–	69/–	67/–	72/–	80/–	81/–	54/–	56/–	62/–	64/–
October ..	43/–	45/–	78/–	80/–	42/6	43/6	74/–	75/–	51/–	53/–	68/–	69/–	67/–	72/–	79/–	81/–	52/–	54/–	62/–	64/–
November ..	42/–	43/–	85/–	88/–	41/–	42/6	68/–	69/–	56/–	58/–	67/–	69/–	65/–	68/–	78/–	80/–	50/–	52/–	60/–	61/–
December ..	45/–	46/–	84/–	86/–	41/6	42/6	64/–	65/–	72/–	76/–	81/–	82/–	61/–	63/–	68/–	70/–	47/–	50/–	58/–	59/–
Average ..	38/11		63/4		43/10		73/6		52/2		68/2		71/11		82/4		59/7		69/2	

the premium that the product of the latter group of countries enjoys as a consequence of its superior quality. Since they first came into prominence, West African, Brazilian and other "ordinary" cocoas have been looked upon mainly as bulk cocoas, with which it is necessary to combine some proportion of the finer types to secure the requisite fine flavour. Ordinary cocoas have had an additional use as the source of cocoa-butter (needed for chocolate manufacture) while the resultant large quantities of cocoa powder, although it is cheap and its nutritive qualities high, have been disposed of with some difficulty.

238. The narrowing of the price margin between fine and ordinary cocoas is the result partly of an improvement in the quality of West African cocoa, and partly of development of manufacturing methods enabling chocolate manufacturers to limit the amount of fine cocoa used in their output or indeed to dispense with fine cocoa altogether; to some extent the latter cause is linked up with the former. Having once adopted a formula which enables a sufficiently high grade chocolate to be produced with a minimum of the more expensive kinds of raw material, manufacturers hesitate to vary it, and may, indeed, in times of temporary shortage even pay a premium for ordinary cocoa rather than change their formula.

239. A further factor in the narrowing of the price difference between fine and ordinary cocoa may be the gradual deterioration in quality of the former, owing to the crossing of the "criollo" variety (which produces the very finest type of cocoa) with the hardier but rather inferior "forastero." In plantations where both varieties are grown, the "criollo" tends to assume the characteristics of "forastero." In so far as the reduction in the price of "fine" cocoas is due to a change from criollo to forastero it may be that growers are making up in quantity for what they lose in average price. But the narrowing margin between ordinary and fine cocoas, when taken in conjunction with the steady growth in the production of the former and the decline in the production of the latter, suggests that West African and other producers of ordinary cocoas are likely to occupy a still more prominent place in the cocoa world in the future than they have done in the past.

240. Yet all the important chocolate manufacturing countries still find it necessary or desirable to import a certain proportion, albeit a diminishing proportion, of the finer cocoas. Fully 23 per cent. of

imports into Switzerland and about 20 per cent. of those into the United States and Spain can be definitely classed as fine cocoas, with France and Italy having a proportion of about 16 per cent., the United Kingdom and Germany 10 per cent. and Holland 6 per cent. In the case of the last-named country, the importation of ordinary cocoas is on account of the large export trade in cocoa-butter, for which almost any inferior cocoa is a suitable raw material.

241. It is apparent, either that the practice of using the finer cocoas to improve the general quality of the finished product still largely persists, or that some manufacturers continue to use the finer kinds of cocoa for producing superior kinds of chocolate and chocolate confectionery. In all probability both explanations are correct, and the finer cocoas may consequently be expected to continue to enjoy a premium over the ordinary grades, unless production of the fine sorts should show an unexpected increase.

242. As regards future production, every indication appears to point towards a further reduction in the supply of fine cocoas. Ecuador seems to be going the way of Surinam, a standing example of the damage that may be caused by the "witch-broom" disease; Venezuela is slowly reducing its output; the British West Indies and Ceylon are barely maintaining their production: and only Costa Rica, among the countries of Latin America, seems to be making progress. The reduction is due to lack of power to compete with the cheaper products of countries producing ordinary cocoa; and to the competition from alternative crops—coffee, bananas —which may be more remunerative or more easily produced. But any improvement in demand for the finer sorts of cocoa, any depression in prices of the competitive crops, or any successful research tending to increase output per tree and thus reduce cost of production might check the decline in production and even lead to a recovery. None of these possibilities is remote. Those manufacturers of chocolate who use mainly fine cocoas are understood to be well maintaining their share of the chocolate and confectionery trades, at any rate in this country; among competitive crops, coffee (the most favoured competitor in South America) shows signs of over production; while the development of tropical agricultural research may have enormous results upon cocoa production.

243. Turning to ordinary cocoas, indications appear to point quite as definitely towards a further increase in production. Nigeria, the Ivory Coast, and other West African possessions and mandated

territories of Britain and France have all substantial areas yet suitable for cocoa production, and all are making determined efforts to develop the industry. In South America, Brazil is in the same position, with large areas suitable for cocoa, and a determination to build up an export trade in agricultural products additional to coffee. Only in the Gold Coast is the position obscure. There are still substantial and suitable areas not yet planted to cocoa, but established plantations are falling out of cultivation, and any appreciable further increase in output is problematical, being dependent upon an improvement in conditions of production—greater attention to the requirements of the soil, a check to deforestation, and more effective control over disease and insect pests. Given these conditions, the Gold Coast can produce even larger quantities of cocoa in the future than in the past. But even if the Gold Coast makes no further progress, it is evident that the future production of ordinary cocoa in the world is likely to increase rapidly.

244. The capacity of the world to absorb very substantially larger supplies of cocoa can hardly be doubted. Of the total retained imports of raw cocoa into the various countries of the world, averaging in the three years 1925–27 some 466,000 tons, five countries (United States, Germany, United Kingdom, Holland and France) together accounted for over 80 per cent. and only in one case (Holland) among these is the net export trade in cocoa products of importance in relation to imports of raw cocoa. Disregarding the export trade in products, imports of raw cocoa into the United States are equivalent to only about 3¼ lb. per head per annum, or about one ounce per week. In other leading importing countries imports per head of the population are smaller, Germany importing about 2½ lb., the United Kingdom about 2¾ lb. and France rather under 2 lb. per head, on the average of the three years 1926–28. Holland's net imports of raw cocoa amount to 13 lb. per head, but fully 7 lb. of this are exported in the form of cocoa powder and cocoa butter, apart from exports of manufactured chocolate.

245. Consumption of cocoa in these and some other countries has risen with surprising rapidity, but the rate of increase has recently suffered a check, which may be attributed to an approach towards saturation point, and to changes in fashions of food, drink and habits. It seems certain that contributory causes to the slowing up of demand for chocolate have been the increase in the use of tobacco among women; dieting and the increased consumption of fruit; the development of the

soda fountain and the increased demand for ice cream and fruit syrups (although a certain amount of cocoa powder is also utilised in these products); and possibly the greater variety of choice confectionery of other kinds. To these may be added the fact that chocolate confectionery tends to use less chocolate and more varied fillings than in the past, but as against this may be set the apparent increase in the demand for sweetened chocolate bars and cakes. As regards cocoa powder, as a beverage, it is doubtful whether at any time since the development of the West Africa cocoa industry it made the striking advance that chocolate and chocolate confectionery recorded. There are no figures available to show how the increased consumption of cocoa in the various countries is apportioned as between cocoa powder as a beverage, and chocolate as a confection or food; but in this country, at any rate, the development of the latter is self-evident, while there appears to be an over-production of cocoa powder in the world resulting from the increase in the demand for cocoa butter arising from the larger manufacture of chocolate. Consumption of cheap cocoa powder appears to be much heavier among the poorer classes of some European countries such as France, Germany and Belgium than it is in this country.

246. It does not seem likely that even in the countries which are the largest importers of cocoa, the consumption of chocolate or other cocoa preparations has yet nearly reached saturation point. In other countries consumption is decidedly less. South America, and other countries where cocoa is grown, consume very large quantities of the product, but in many European countries, in Russia, and throughout Asia, the consumption of cocoa preparations is almost negligible. There would appear to be considerable possibility of developing in the course of time a trade in cocoa with some of these parts of the world.

247. The difficulty of assessing the actual average consumption per head of raw cocoa in any country has already been mentioned, but approximate figures may be calculated showing the net imports of raw cocoa and net imports or exports of cocoa products. The diverse methods of classification in import and export statistics offer some obstacle to an adequate presentation of these facts, but the following table shows approximate average figures for a number of cocoa importing countries, separating (*a*) raw cocoa, (*b*) cocoa butter, (*c*) cocoa powder and paste and (*d*) chocolate for the years 1926 to 1928. The table should, however, be read in conjunction with the note which immediately follows it.

TABLE C.—*Average Net Imports (+), or Exports (−) of Raw Cocoa, and Cocoa Preparations, per head of Population* (1926 *to* 1928).

Country.	Raw Cocoa.	Cocoa Butter.	Cocoa Powder and Paste.*	Chocolate and other Cocoa Preparations*
	lb.	lb.	lb.	lb.
United Kingdom	+2·70	+0·06	−0·19	+0·26
Canada	+1·60	+0·54	+0·16	+0·15
Australia	+1·30	+0·43	+0·09	(*a*)
New Zealand	+0·90	(*a*)	+0·46	+0·87 (*c*)
Union of South Africa ..	+0·06	+0·04	+0·11	+0·32
Irish Free State	+0·18	(*a*)	(*a*)	+1·31
U.S.A.	+3·30	−0·01	+0·03	−0·02
Germany	+2·37	−0·04	−0·02	−0·09
Holland	+13·06 (*b*)	−3·69	−3·98	−3·77
France	+1·85	+0·05	+0·21	−0·20
Spain	+0·86	(*a*)	+0·02	—
Italy	+0·40	+0·02	+0·03	—
Switzerland	+4·29	+0·89	+0·04	−4·51
Belgium	+1·76	+0·59	+0·08	−0·54
Sweden	+1·26	(*a*)	+0·06	+0·07
Norway	+1·73	−0·01	+0·03	−0·13
Denmark	+1·60	+0·52	+0·28	+0·78
Czechoslovakia	+1·07	+0·07	+0·01	−0·01
Poland	+0·31	+0·07	+0·05	—
Austria	+1·64	+0·08	+0·11	−0·09
Hungary	+0·51	+0·02	+0·04	—
Portugal	+0·16	(*a*)	+0·02	—
Rumania	+0·12	+0·03	+0·06	—
Russia	+0·04 (*d*)	(*a*)	—	(*a*)

(*a*) Not available. (*b*) Net import trade in cocoa husks omitted.

(*c*) 1928 only. (*d*) 1925–27.

* The classification of cocoa products in the different countries shown above does not permit of exact comparability in the last two columns of the table. Thus under the heading cocoa powder and paste are included chocolate, other than confectionery, in the United States, New Zealand, and the Union of South Africa; potable chocolate in Australia; chocolate paste in Switzerland; and cocoa butter in Spain. Chocolate and other cocoa preparations include sugared cocoa powder in Norway; cocoa in blocks in Sweden; cocoa paste in Czechoslovakia; and all cocoa preparations in the Irish Free State.

248. These figures can only give a very approximate indication of the consumption of cocoa products, in the absence of information as to the form in which the raw cocoa imported is actually consumed. The third British Census of Production gave an output of about 110 million lb. of cocoa and chocolate, and 160 million lb. of chocolate confectionery in Great Britain in 1924, apart from any production of chocolate or cocoa by bakers and biscuit makers, or by the confectionery trade in Northern Ireland. Yet only 120 million lb. of raw cocoa were entered for home consumption in Great Britain and Northern Ireland in that year. But the figures in Table C do show how small is the consumption of cocoa and its products in a number of European countries.

249. Most countries into which cocoa is imported impose import duties on the commodity, and many producing countries tax exports as a source of revenue. Hence there are considerable obstacles to the distribution of the commodity both outward and inward. The export and import duties in a number of countries are shown below, with conversions at current rates of exchange.

TABLE CI.—*Export Duties on Raw Cocoa.*

Brazil	Duties levied by States, ranging up to 10 per cent. *ad valorem*.
Ecuador	0·08 sucres per kg. (3*s*. 4*d*. per cwt.).
Dominican Republic ..	$3·0 per 100 kg. (6*s*. 4*d*. per cwt.).
Haiti	11·425 gourdes per 100 lb. (10*s*. 6*d*. per cwt.).
Ceylon	1·00 rupee per 100 lb. (1*s*. 8*d*. per cwt.).
Gold Coast .. .. / *Nigeria*	1*s*. 2*d*. per cwt.
Grenada	1*s*. per cwt. (when cocoa is above 40*s*. and not exceeding 50*s*. per cwt. in London), up to 2*s*. (when over 80*s*. per cwt.), and 3*d*. per cwt. for each 10*s*. above 90*s*.
St. Lucia	*Estate Cocoa*.—Nil while f.o.b. price is below 45*s*. per cwt. *Ordinary Cocoa*.—Nil where f.o.b. price is below 35*s*. per cwt. From 35*s*. up to 40*s*., 4*d*. per cwt., and on a graduated scale up to 2*s*. 5½*d*. per cwt. when f.o.b. price is 95*s*. to 100*s*. per cwt.
St. Vincent	6*d*. per cwt.
Trinidad	5*d*. per cwt.
Guadeloupe .. .. / *Martinique*	Cocoa valued up to 270 fr. per 100 kg.—4 per cent. *ad valorem*. Cocoa valued at 270–400 fr. per 100 kg.—4½ per cent. *ad valorem*. Cocoa valued at over 400 fr. per 100 kg.—5 per cent. *ad valorem*.

TABLE CI.—*Export Duties on Raw Cocoa*—continued.

Madagascar	3 per cent. *ad valorem*.
Belgian Congo	3 per cent. of official valuation.
San Thomé and Principe	·012 gold escudos per kg. (2*s*. 8*d*. per cwt.) in Portuguese ships to Portuguese ports. ·025 gold escudos per kg. (5*s*. 8*d*. per cwt.) in Portuguese ships to foreign ports. ·040 gold escudos per kg. (9*s*. 0*d*. per cwt.) in foreign ships to foreign ports plus overtax of 50 per cent. on all exports.
Fernando Po	10 pesetas per 100 kg. (2*s*. 8*d*. per cwt.) exported to Spain and Spanish possessions. 15 pesetas per 100 kg. (4*s*. 0*d*. per cwt.) exported to foreign countries.
Western Samoa ..	2*s*. per cwt.
French West and Equatorial Africa. *Dutch Guiana* .. .. *Jamaica* .. .. *Costa Rica* .. .. *Venezuela*	Nil.

Import Duties on Raw Cocoa.

United Kingdom ..	General, 14*s*. per cwt. ; British preferential, 11*s*. 8*d*. per cwt.
United States	Free.
Switzerland	3 fr. per 100 kg. (1*s*. 3*d*. per cwt.).
Germany	*Raw*.—35 reichsmarks per 100 kg. (17*s*. 5*d*. per cwt.). *Roasted*.—Unshelled 60, shelled 150 reichsmarks per 100 kg. (29*s*. 10*d*. and 74*s*. 8*d*. per cwt.).
Italy	30 gold lire per 100 kg. (12*s*. 1*d*. per cwt.).
Argentine	5 per cent. of official valuation.
Holland	Free.
Spain	150 gold pesetas per 100 kg. (60*s*. 7*d*. per cwt.).
Czechoslovakia	40·60 kr. per 100 kg. (2*s*. 6*d*. per cwt.).
Sweden	0·05 kr. per kg. (2*s*. 10*d*. per cwt.).
Denmark	0·06 kr. per kg. (3*s*. 4*d*. per cwt.).
Norway	0·15 kr. per kg. (8*s*. 5*d*. per cwt.).
France	180 fr. per 100 kg. (14*s*. 10*d*. per cwt.). French Colonial produce free (up to a fixed quota for some colonies). Internal tax, 120 fr. per 100 kg. (9*s*. 11*d*. per cwt.), and turnover tax of 2 per cent. of duty paid value, are also imposed on all imports.

TABLE CI.—*Import Duties on Raw Cocoa*—continued.

Belgium	100 fr. per 100 kg. (5*s*. 10*d*. per cwt.) plus transmission tax, 2 per cent. *ad valorem*.
New Zealand .. .. *Australia*	Free.
Canada	General, 2 dollars per 100 lb. (9*s*. 4*d*. per cwt.); British preferential, free, except British West Africa, west of Niger, which pays 1½ dollars per 100 lb. (7*s*. 0*d*. per cwt.). Sales tax of 2 per cent. of f.o.b. value plus duty is also imposed on all imports.
Rumania	Green, 2·50 gold lei per 100 kg. (1*s*. per cwt.) ; roasted, 32·50 gold lei unshelled and 75·00 gold lei shelled per 100 kg. (13*s*. 2*d*. and 30*s*. 4*d*. per cwt., respectively).
Poland	25 zloty per 100 kg. (5*s*. 10*d*. per cwt.) plus manipulation tax of 10 per cent. of the duty.
Austria	*Raw*.—50 gold krone per 100 kg. (21*s*. 1*d*. per cwt.). *Roasted*.—60 gold krone per 100 kg. (25*s*. 4*d*. per cwt.).

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